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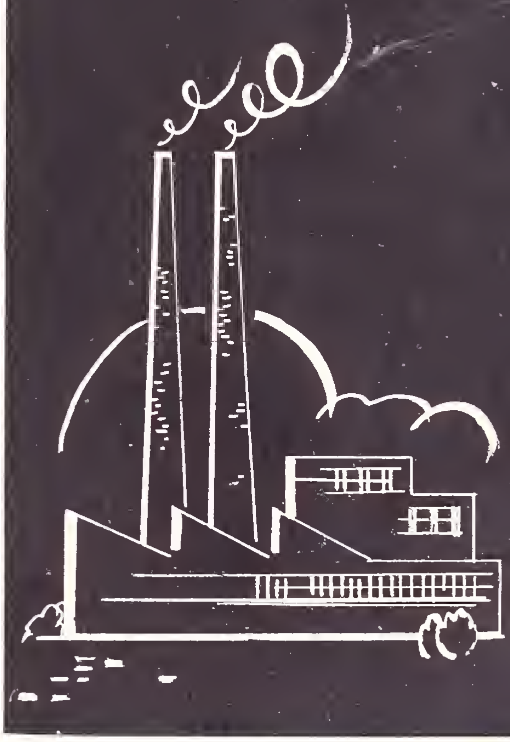
U. S. DEPARTMENT OF AGRICULTURE

EMPLOYEE FOOD SERVICES

in Manufacturing Plants

- Management Appraisals
- Nature and Extent
- Vending Machines



ASHINGTON, D. C.

Marketing Research Report No. 325

U. S. DEPARTMENT OF AGRICULTURE
Agricultural Marketing Service
Marketing Research Division

The food services provided by manufacturing companies for their employees represent an important market for agricultural products. This report describes that market -- the kinds of plants that are and are not included in it, the types of facilities offered, management appraisals of the pros and cons of providing on-premise food, attitudes toward company versus contractor management of food services, financial arrangements, purchasing practices, appraisals of suppliers. Data on vending machines are also shown. Other reports based on this research will deal with plant facilities' use of food products, including expenditures, quantity, and types of food used.

Data were collected and processed by the Marketing Services Company, Division of Dun & Bradstreet, Inc., New York, under contract with the Department of Agriculture. The cooperation of manufacturing firms throughout the country in granting interviews and in making food service records available is gratefully acknowledged.

The study represents the cooperative efforts of many individuals in the Department. It was carried out under the supervision of Trienah Meyers and Winn F. Finner of the Marketing Research Division. Esther S. Hochstim and Rosalind C. Lifquist had major responsibility for its planning and execution. Earl E. Houseman was the consultant for the Department in design of sample. Lela Yvonne Clayton assisted the author in the analysis of the data.

EMPLOYEE FOOD SERVICES IN MANUFACTURING PLANTS

Management appraisals
Nature and extent
Vending machines

Marketing Research Report No. 325 June 1959

UNITED STATES DEPARTMENT OF AGRICULTURE
Agricultural Marketing Service
Marketing Research Division
Washington, D. C.

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EMPLOYEE FOOD SERVICES IN MANUFACTURING PLANTS

--Management appraisals
--Nature and extent
--Vending machines

By Esther S. Hochstim, project director
Market Development Branch
Agricultural Marketing Service

SURVEY HIGHLIGHTS

Details on page:

In a sample of manufacturing plants having 250 or more employees each, executives were interviewed about their attitudes and practices with regard to providing food services and vending machines for the use of plant personnel. The managers of the food services, in the plants providing them, were also interviewed, and inventory and purchase records were studied.

From the information so obtained, it appears that:

--Among plants of this size, about half were providing employee
food services -- cafeterias, mobile carts, snack bars, restaurants,
or other facilities serving hot foods -- at the time of the survey. It 10
is estimated that the sample of foodserving plants interviewed represented 38
nationally almost 6,000 plants that spent in the neighborhood
of $20 million for the food used in a 4-week period during January-February 1956. If this period is representative, the findings suggest an annual expenditure in the neighborhood of $260 million.

--The larger the plant, the more likely it was to have food services.
These services were reported by about 7 out of every 10 plants
with 1,000 or more employees (the "large" plants), by about 6 out of 10
10 of those with 500 to 999 employees (the "medium" plants), and by
about 4 out of 10 with 250 to 499 employees (the "small" plants).

--As might be expected, the larger the plant with food services,
the more money it spent for food. Of all the expenditure by these 38
plants for food, the large plants spent about 70 percent, medium
plants about 20 percent, and small plants about 10 percent.

--The trend was toward more widespread provision of food services,
for the newer the plant the more likely it was to include food services 15
in its plans.

Details
on page:

--Employee food services benefited the company most in improved
morale, in production gains (particularly from the shorter lunch
period), in labor-management relations, and in personnel recruitment.
The major item on the debit side was cost -- though management time,
employee complaints, lost time caused by employees lingering over 17-19
food, and lack of space were also important drawbacks. On balance,
however, the good outweighed the bad; for practically all of the ex-
ecutives interviewed said that if they had it to do over again, they
would set up food services.

--About two-thirds of the food services were run by outside con-
tractors, about a third by the companies themselves. Cafeterias pre-
dominated in both groups, but especially among company-run services; 23
mobile food carts and such installations as canteens and lunch
counters more often were the responsibility of outside contractors.

--The trend was toward contractor rather than company management:
Among the plants that had changed form of operation (about a fourth of
those with services), about three had shifted from company to contract
operation for every one that had shifted in the other direction; and
executives with company-operated services were more inclined to find 24-25
fault than were those with contract operation. Apparently, the advan-
tages of more control over operations and greater interest in employee
welfare derived from self-operation were not strong enough to balance
its higher costs and greater drain on management time and attention.

--Direct financial contribution by the company to the food serv-
ices was majority practice where companies operated their own services,
but was the exception in contract-operated services. However, both 26-28
types of services generally benefited from such indirect subsidies as
free rent, utilities, and other overhead expenses.

--Cafeterias were the most important food facility in industrial
plants. They outnumbered other types of services by a large margin.
Cafeterias were reported by 78 percent of the foodserving plants 29-30
compared with 20 percent for mobile food carts, 16 percent for can-
teens, candy stands, or lunch counters, and 8 percent for restaurants;
and they were generally reported to be the facility serving the largest
number of employees.

--A minority (37 percent) of foodserving plants confined them-
selves to one meal period a day, 28 percent served two periods, and
35 percent three or more. Practically all plants served a noon meal, 31
almost half served at breakfast time, about 4 out of 10 served at
dinner hour, and smaller proportions at other times.

--Reactions to convenience foods were somewhat mixed, but most
facility managers had used some or many, and more praised than 35-37
criticized them. Major advantages were savings in time, labor, money,
and space, better control and less waste, and uniformity. Criticisms
were mainly of price, quality, and flavor or texture.

Details on page:

--The food for most industrial food services was bought at wholesale, usually from one type of supplier, and on open book account, net 30 or net 7 days. Brand appeared to be the ranking stipulation in the choice of most packaged items; grades or standards and personal inspection for most fresh items. 39-42

--Food suppliers were doing a good job of serving these customers, for only a third of the facility managers had any criticism of current suppliers while three-fourths thought of at least some suppliers as deserving special praise. Meat dealers led the list of both the praised and the criticized suppliers. 42-44

--About 9 out of 10 plants had vending machines, usually more than one kind of machine. Plants without food services were slightly less likely than others to have vending machines, but those that did appeared to have more elaborate installations. Soft drinks and such items as candy, peanuts, or gum were the most widely vended items, followed by coffee, milk, cookies, and ice cream. 45-48

--Very few vending machine operators planned any decreases in their coverage, but a fifth planned increases. 48

--About 9 in 10 executives in plants with vending machines saw advantages in them, mainly that they helped improve employee morale and saved production time by keeping employees near the job. On the other hand, 8 in 10 cited disadvantages, centering on housekeeping problems, employees wasting time, and unreliable servicing. 49

* * * *

Concurrently with the study of plants with 250 or more employees, a small sample of plants with 100 to 249 employees was interviewed by telephone to gain some impressions of the attitudes and practices of smaller companies. From this limited study, it appears that:

--Only about one in five of these smaller plants had food services. Those with food services were less likely than larger plants to have cafeterias and more likely to have mobile food carts. Most of them served only one meal -- lunch. 50

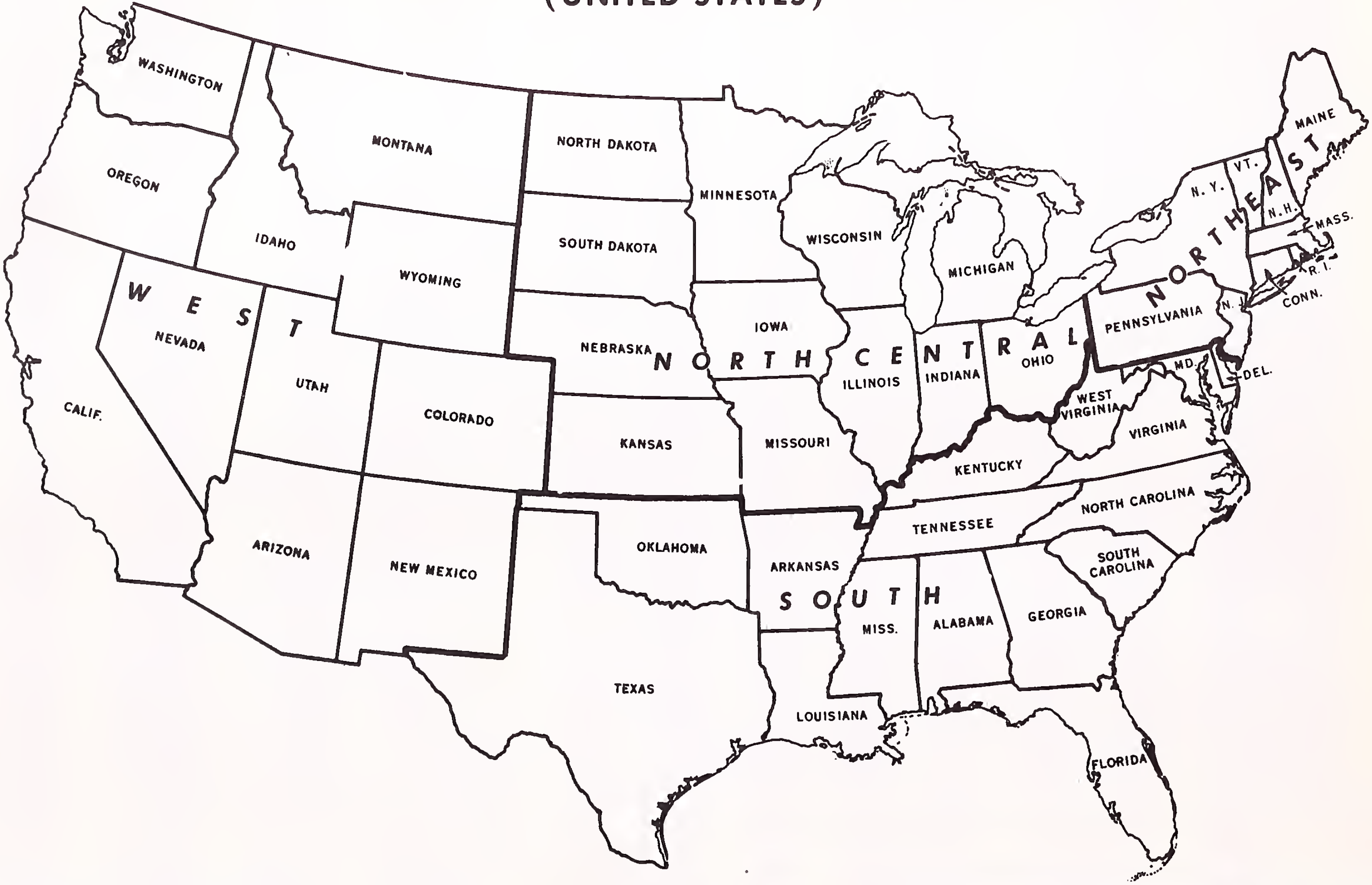
--Management appraisals of food services were similar to those of larger companies and, like the executives of larger companies, practically all of these managers would set up food services if they had the choice to make again. 50

--Very few plants without food services at the present time either had previously had such services, or were planning to establish services in the next year or so. 51

--These smaller plants were about as likely as larger plants to have vending machines on the premises, but generally appeared to have less extensive installations. 51

REGIONS USED IN SURVEY

(UNITED STATES)



U. S. DEPARTMENT OF AGRICULTURE NEG. 3669-56(11) AGRICULTURAL MARKETING SERVICE

INTRODUCTION

Expenditures for food represent a large part, in some cases the single most important part, of the purchases of American families. Recent years have witnessed marked changes in consumption patterns, one of these being the greatly increased practice of eating away from home.

For some time food growers, processors, manufacturers, and distributors, as well as equipment and other suppliers, have been seeking to learn more about this market -- its size, its composition, its marketing practices, its needs, its potentials.

This report presents the results of a study of one segment of the "away from home" food market: The food facilities which manufacturing plants provide for their employees. These facilities represent an important and in some ways specialized market for agricultural products. Information about them was gathered as part of the Department of Agriculture's broad program of research designed to expand the market for farm products and to improve market efficiency.

Scope of the Study

Planning for this study involved a number of decisions on how best to spend the research dollar, for if all manufacturing plants were included, a great deal of waste would be involved in studying establishments so small that they were unlikely to provide food services, or if they did would have very small installations.

On the theory that the larger plants were more likely to have food services and to have extensive installations, the most efficient design appeared to be:

--Noncoverage of plants with fewer than 100 employees as being unlikely to yield much information.

--Limited coverage of plants with 100 to 249 employees to gain a general picture of their thinking and activities with regard to food services.

--Intensive coverage of plants with 250 or more employees. Within this group of plants, the larger plants would have greater representation than their number would warrant and the smaller would have proportionately less representation. This would provide the broadest possible coverage of the most important part of the market, and the data could be weighted to provide figures for the 250-and-over group as a whole.

The study was designed to provide data about manufacturing plants in the United States as a whole and in four Census-defined regions of the country: Northeast, North Central, South, and West. The map facing page 5 shows the boundaries of these regions.

Major emphasis was on industrial plants with food facilities other than vending machines, which served at least one hot dish -- though some information about vending machines was secured from all of the plants contacted.

Conduct of the Survey

Because no definitive information was available on the proportions and characteristics of plants having food services, the first concern of the study was to provide these data and to establish a basis for sampling. This was done by means of telephone "screening" interviews with executives in a probability sample of manufacturing plants. These interviews provided information on the incidence of food services and vending machines, on whether the food services were operated by the company itself or by outside contractors, and on certain plant characteristics.

On the basis of these screening interviews, a sample of plants in the 250-and-over group that provided employee food services was selected for intensive study. This involved three separate steps:

--First, personal interviews were made with plant executives to learn management philosophy and attitudes on the provision and operation of food services, including the satisfactions and the drawbacks, financial arrangements, and appraisals of company versus contract operation of food services. Some additional information on vending machines and on plant characteristics was also secured at this interview.

--The second step was personal interviews with food service managers in the same plants to gather information on the physical makeup and operating characteristics of the food installation, including the types of facilities operated, kinds of meals served, buying practices, sources of supply, terms of purchase, and attitudes toward suppliers.

--The final step was to make detailed records of food use in the same plants. This included two sets of inventories, taken about 4 weeks apart, of all food on hand, and records of all food purchase orders and requisitions for this period. These provided a comprehensive picture of the quantity and kinds of food used in the period, how and in what form food was purchased, expenditure data, and other detailed information needed for analysis of the market.

To round out the picture, the study also included interviews with executives in a small sample of nonserving plants with 250 or more employees. In addition to information on the companies' reasons for not having food services and on plans for future installation, these interviews provided a basis for comparing characteristics of foodserving and nonserving plants.

Short interviews with executives of plants with 100 to 249 employees were conducted by telephone to gather information on such questions as whether or not food services were provided, management attitudes toward such services, and plans for the future.

Time of Interviewing

All interviewing was done between late December 1955 and mid-April 1956, with the bulk completed before the end of February 1956. Inventory and purchase record data were all taken during January and February, and covered on the average about a 4-week period. Although no one period can be representative of the entire year, this time appeared to be relatively uncomplicated by major holidays, widespread strikes, or other factors that might affect food practices.

Design of the Sample

At the time the study was being planned, the latest data on number and employee size of manufacturing plants were the first-quarter 1953 records of the Bureau of Old Age and Survivors' Insurance (BOASI). The sampling for the survey was drawn from the 28,146 manufacturing establishments with 100 or more employees shown by these records; those which had fewer than 100 employees at the start of 1953 or which were not in existence at that time were not represented.

From these records were drawn two separate samples, one of plants with 250 or more employees, the "major" sample for the study, and a less extensive sample of plants with 100 to 249 employees, the "smaller plant" sample.

Within the major sample, three size-of-plant groups were drawn: 250 to 499 employees (the "small" plants), 500 to 999 employees (the "medium" plants), and 1,000 or more employees (the "large" plants). More large plants and fewer small plants were included in this sample than their relative numbers in the universe of plants would yield.

During the telephone interviewing, it was found that a number of changes in plant size had occurred between the time the BOASI records were made and the time of the study. Some plants in the smaller-plant sample had gone below 100 employees or had moved up into the 250-or-more class, while some chosen for the major sample had shifted from one size group to another, or into the smaller-plant group, or even below.

These changes were incorporated into the study. The smaller-plant sample includes also the plants from the original major sample which shifted into its size group. Findings for the major sample reflect the plants that had grown out of the smaller-plant group, and also the changes in the three size-of-plant groups of which it is composed.

Because the plants were selected on the basis of 1953 data, weights for the major sample had to be calculated and applied on that basis. However, tabulations are presented in terms of the 1956 size of plant as learned in the survey.

To provide more cases for regional analysis, the major sample included twice as many plants in the West as a proportional selection would have yielded. Analysis for the West is based on all the plants studied there; in analysis for the total major plant study, however, these plants receive only half this weight.

For the major sample of plants with food services, over 400 were approached and interviews were obtained with executives in 391; in 378 of these the facility managers granted interviews, but some of them did not permit inventory and record data to be taken. The tabulation below shows the number of plants, by size and by region, included in the major sample at various stages:

Plant size and location	All plants	Plants with food service		
	Telephone screening interviews	Plant executive interviews	Food service manager interviews	Inventory and purchase records studied
	Number	Number	Number	Number
United States total	825	391	378	352
Employee size group:				
1,000 or more	325	184	177	170
500 - 999	220	113	110	103
250 - 499	280	94	91	79
Region:				
Northeast	275	112	108	97
North Central	270	149	141	128
South	163	81	81	80
West	117	49	48	47

In addition to the plants in the tabulation, there were 77 plants in the 250-and-over group without food services and 182 plants in the small-plant group.

Limitations of the Data

In interpreting the results of this survey, as in all sampling studies, allowance must be made for error that might result from interviewing a sample and not the whole population. The latitude allowed for sampling error varies with the number of persons asked a question and the percentage of these persons giving a response. For example:

> Among the 825 executives of plants with 250 or more employees interviewed by telephone, 52 percent said that their plants had food services. In this case, the chances are about 19 in 20 that this is within 4 percentage points of the "true" figure; that is, if a census of such plants had been taken, using the survey techniques, it would be expected that the results would be in the range from 48 to 56 percent.
>
> Again, 38 percent of the 117 executives in the West who were interviewed indicated that their plants had food facilities. In this case, the calculated error is about 11 percentage points and the chances are 19 in 20 that a census of Western plants made under the same conditions would have yielded a figure between 27 and 49 percent.

From the table of sampling errors presented in the Appendix, the precision of figures shown in the study can be estimated. In general, the analysis avoids presentation of data based on fewer cases than the 48 facility managers interviewed in the West.

An additional source of error in this study results from the sampling methodology used. As indicated above, plants were interviewed extensively and records of food use obtained (with a few exceptions) only if they had had 250 or more employees in 1953 as well as in 1956. Firms which had fewer than 250 employees in 1953 were not adequately represented in the sample, those with fewer than 100 or not in existence at that time, not at all. The results reflect, therefore, not all plants or all of a certain size, but a universe projected from the type of sample selected and the internal adjustments made.

FOOD SERVICES IN PLANTS WITH 250 OR MORE EMPLOYEES

THE INPLANT FOOD MARKET

Incidence of Food Services

In the sample of manufacturing plants with 250 or more employees reported here, about one plant manager in two (52 percent) said that his company provided some form of hot food service (cafeteria, mobile food cart, restaurant, snack bar, etc.), exclusive of vending machines, for its employees in early 1956 (table 1).

It is estimated that this food market comprised in the neighborhood of 6,000 plants (table 65).

The larger the plant, the more likely it was to provide food services; in fact, hot food service was available in about twice as large a proportion of plants with 1,000 or more employees as of plants with 250 - 499 employees.

Following are the proportions of foodserving plants in the various size groups:

37 percent of plants with 250 - 499 employees
59 percent of plants with 500 - 999 employees
72 percent of plants employing 1,000 or more

It does not follow from this, however, that most of the plants with food services were large plants. In both 1953, the year upon which the sample was based, and 1956, the year the data were collected, small plants outnumbered medium and large plants combined in the Census-defined universe of manufacturing establishments with 250 or more employees in the United States.

At the same time, as described in the sampling statement, there were internal changes in the sample between the two periods, some plants decreasing in size but others increasing in size, with the net result that the weighted sample of plants with food services reported for this study is made up of roughly equal proportions of small, medium, and large plants (table 65).

Manufacturing plants in the North Central and Southern regions were more likely than others to provide food services. Proportions in the various regions having food services were as follows (table 1):

38 percent of plants in the West
44 percent of those in the Northeast
57 percent of those in the North Central region
62 percent of those in the South

The North Central and Northeastern States, with relatively large concentrations of manufacturing plants, made up the heavier weight in the sample of plants with food services. The survey sample of foodserving plants with 250 and more employees, projected to reflect the universe of such plants at the time of the survey, was made up as follows (table 65):

40 percent were in the North Central States
30 percent were in the Northeast
24 percent in the South
6 percent in the West

In evaluating the findings for foodserving plants in the various regions, differences in size-of-plant distribution should be noted. For example, it is apparent from the tabulation below that the weighted sample of foodserving plants in the West had the largest proportion of small plants, while the North Central region had the largest proportion of plants with 1,000 or more employees.

The weighted samples of plants with food services in the four regions were made up as follows:

North Central States:	31 percent 250 - 499 employees
	25 percent 500 - 999 employees
	44 percent 1,000 or more employees
Northeast:	31 percent 250 - 499 employees
	40 percent 500 - 999 employees
	29 percent 1,000 or more
South:	32 percent 250 - 499 employees
	42 percent 500 - 999 employees
	26 percent 1,000 or more
West:	41 percent 250 - 499 employees
	23 percent 500 - 999 employees
	36 percent 1,000 or more

Comparisons of Plants With and Without Food Services

The major difference between the samples of plants reported here that did and did not provide food services is that the latter group was heavily weighted with small plants -- those with 250 - 499 employees. From the following tabulation, it is apparent that the nonfeeding group had about twice as many small plants as were in the group that provided food services:

Employee size group	Plants with food services	Plants without food services
	Percent	Percent
250 - 499 employees	32	62
500 - 999 employees	34	25
1,000 or more employees	34	13
	100	100

Much less sharp is the difference by region of the country, though the North Central region has a higher weight than the Northeast among plants with food services, while the reverse is true in the sample of nonfeeding plants:

Region	Plants with food services	Plants without food services
	Percent	Percent
North Central	40	27
Northeast	30	44
South	24	21
West	6	8
	100	100

As shown above, larger plants were more likely than smaller to provide food services, and North Central and Southern plants were more likely than those in the Northeast or West to provide services. In addition, the survey studied a number of other relationships in order to gain better understanding of this market for food; for example: Were food services more likely to be associated with the longer, or shorter, work week? With a longer or shorter work day? With longer, or shorter, lunch periods?

The answers to these and other questions put to executives of 391 plants which provided food services and to those of 77 plants which did not provide food services indicate that:

--The length of the work week appeared to be about the same, regardless of whether the plant provided food facilities (table 9).

In both groups, about 7 out of 10 plant managers said their plants operated on a 5-day week.

--Round-the-clock operations were somewhat more likely to be found in plants with food services than in those without (table 10).

> About 4 in every 10 executives of plants with food services said their plants worked three shifts, compared with about 3 in 10 without food services.

This may be a reflection of the difference in plant size between the two groups rather than directly related to the provision of food service, because among plants with such service, the larger plants were more likely to work extra shifts. Among plants with food service, three-shift operation was reported by:

26 percent of small plants
45 percent of medium plants
59 percent of large plants

--The plant with a steady payroll apparently was somewhat more likely to provide food services than was the one with seasonal peaks (table 12).

> The difference between the two groups was very slight: 77 percent of managers of nonfeeding plants and 85 percent of managers of plants with food services said their plants' total payroll tended to remain relatively level throughout the year. However, it may be pertinent that 89 percent of the small plants with food facilities reported steady payrolls.

--The degree of physical activity required of employees appeared to be about the same, regardless of food service provision (table 8).

> Executives were asked to indicate what proportion of their plants' employees were primarily engaged in heavy, moderate, and light physical activity.
>
> Both among plants with food service and those without, the work performed by employees was indicated to be generally light by a little less than 5 out of 10 plant managers interviewed, moderate by about 3 in 10, and generally heavy by somewhat over 2 in 10.

--The factory is still very much a man's world: Male employees predominated in three out of four plants, both among those with food service and among those without (table 7).

--While the short lunch period is the mode in manufacturing plants, it is more likely to be the practice in plants with on-premise food service than in those without (table 11).

80 percent of managers of plants with food facilities said the lunch period allowed to nonexecutive employees was 30 minutes or less, compared with
65 percent of plants without facilities.

The pattern of shorter lunch periods was typical of all three size-of-plant groups among those with food facilities. It will be noted later that many executives of plants with food services volunteered that these services made shorter lunch periods possible.

--Plants without food service were more likely than others to have adequate public eating facilities in the neighborhood (table 15).

More than half (55 percent) of the managers of plants without on-premise food service reported that nearby public facilities could accommodate all of their employees.

On the other side, only 17 percent of executives whose plants provided food service said all of the plants' personnel could be accommodated locally, while 65 percent said either that there were no public facilities available or that public facilities could take care of fewer than a fourth of the plant's employees (comparable figure for nonserving plants, 27 percent).

Despite these nearby eating places, the home kitchen -- particularly the packed lunch -- appeared to be the major source of food in plants without food services. Public facilities and vending machines played an important but secondary role (table 16).

In plants without food services:

99 percent of executives said some of their employees brought their lunch to work,
73 percent said the majority did this

48 percent said some employees went home to lunch,
10 percent said the majority did this

73 percent said some employees used public facilities,
14 percent said the majority did this

13 percent said some employees had lunch sent in; in no case was this majority practice

23 percent said some employees used vending machines,
2 percent said the majority did this

Trends in Provision of Food Services

Food service appears to have become a larger part of the plant pattern over the years. One indication from the study is that: On the average plants with food service appear to be younger plants than those without. This is particularly true of the small- and medium-sized plants among those serving food (table 13).

> On the average (median), plants without food services began operations in 1922.
>
> Median year of establishment for foodserving plants was 1927. (Small and medium plants, 1930; large plants, 1921)

Further indication of this growing tendency toward making food available to employees on plant premises is that: Among plants with facilities, the newer the plant the more likely it was to have started with food services (table 14).

Among plants with food service:

> 83 percent of those which started between 1949 and 1951 installed food services in that period
>
> 80 percent of those started between 1946 and 1948 installed food services in that period
>
> 68 percent of those started in 1941 to 1945 followed the pattern, as did
>
> 51 percent of those started between 1936 and 1940, and
>
> 45 percent of those started between 1921 and 1935; while only
>
> 22 percent of those started before 1921 instituted food services before that time.

Although food facilities are not necessarily permanent -- some plant managers indicated that their plants had had services but discontinued them -- they did appear to be moving into the market at a far greater rate than they were moving out. This was true even since 1945, when war-required facilities might no longer need to be instituted -- or retained (tables 5, 14).

Among all plants without food services, 21 percent of executives said the company had had services in recent years, and

- 13 percent said facilities had been discontinued in 1945 or later
- 8 percent said they had been discontinued before 1945

On the other hand, among plants with food services,

- 39 percent had established facilities since 1945
- 61 percent before that time

Or, putting it on the basis of all manufacturing plants interviewed:

- 52 percent had facilities,
  - 20 percent established since 1945
  - 32 percent earlier
- 48 percent did not have food facilities
  - 6 percent had discontinued facilities since 1945,
  - 4 percent had discontinued facilities earlier
  - 38 percent did not indicate having had facilities

Current expectations, too, indicated that the provision of food services is a widening practice among manufacturing plants:

> Among plants without food services, a few -- 5 percent -- of the managers indicated that their company had definite plans to establish facilities in the near future. (None of the plants that had previously had food services planned to reintroduce facilities.) (Table 6.)
>
> Among plants with food services, none of the managers said they contemplated discontinuing services, and only 1 percent said they contemplated reducing capacity. Actually, 76 percent expected to stay at current levels and 23 percent expected to expand (table 22).

MANAGEMENT APPRAISALS OF FOOD SERVICES

The Why's of Food Services

On-premise food service has many advantages -- for the employee, for the company, for both -- according to the managers of plants offering this service. Asked why facilities had been established and the advantages to management of having them, most executives gave a variety of answers (table 17).

An employee benefit, a morale booster, was the topranking, generalized description of their food services given by three out of every four executives. More specific comments on this theme were that food services provided more healthful meals (29 percent), or less expensive meals (19 percent), than employees would get otherwise, and that the facilities offered employees an opportunity for getting together socially (4 percent).

Production gains, too, were widely mentioned: 56 percent of the executives said food services permitted a shorter lunch period and so saved production time, 19 percent spoke simply of "improved production," and 6 percent indicated that the facilities helped to cut down time lost through illness.

About half the executives said food services were provided, among other reasons, because of inadequate public facilities or to supplement other eating arrangements such as lunches brought from home.

Better labor-management relations, cited by 37 percent of these plant executives, and help in recruiting personnel (12 percent) were other widely-mentioned virtues of food services.

Questioned specifically, the great majority of executives indicated that employee food services were beneficial to employee morale, labor-management relations, employee health, and employee productivity; and about half thought them helpful in recruiting (table 19).

After they had named what they considered to be the advantages and disadvantages of employee food facilities, executives whose plants had such services were asked: Specifically, would you say these facilities have a good effect, a bad effect, or no effect at all on:

Employee morale?	92 percent said "good"
Labor-management relations?	77 percent said "good"
Employee health?	70 percent said "good"
Employee productivity?	63 percent said "good"
Employee recruiting?	48 percent said "good"

Most other executives said food services had "no effect"; very few said they might be detrimental.

The Drawbacks

Executives with on-premise food services were much less voluble in criticizing these services than in praising them; in fact, about 3 out of 10 had no criticism at all (table 18).

The chief drawback to providing food services, as seen by plant executives, was cost: 45 percent of the interviewees whose plants provided food facilities said that they were expensive to operate. That few of these services carried their full costs is clearly indicated in a later section of this report dealing with financial arrangements for food facilities. However, it is also worthy of note that -- as indicated in some of the comments below and other findings from the study -- executives generally appeared to feel the facilities were worth what they cost.

Other important problems cited by these executives included the drain on management time, the difficulty of pleasing all employees, lost production time (mentioned by far fewer than considered production time saved), lack of space:

19 percent said facilities took too much management time
17 percent said employee complaints were a problem
16 percent said production time was lost because employees spent too much time at their food
13 percent found space for facilities a problem
6 percent spoke of maintenance and housekeeping problems
2 percent found meal scheduling difficult

The same problems that affected management presently offering facilities, it appears, operated in the discontinuance of facilities by some plants, and may inhibit other managements from installing them.

It will be remembered that about a fifth of the plants currently without facilities did have them at one time. From the following tabulation of reasons for discontinuing, it will be apparent that two sets of factors entered into the decision: Reduced need for the services, and cost and operating problems.

34 percent spoke of insufficient demand
28 percent said the plants were near public eating places
16 percent said they were discontinuing a wartime practice
7 percent said they had fewer employees

36 percent complained of high operating costs
12 percent spoke of lost production time
11 percent needed the space for other purposes
10 percent had too many employee complaints
2 percent found meal scheduling difficult
1 percent said facilities took too much management time

The same pattern appears when executives whose plants had never had facilities answered the question: "What factors in your plant or its operations have made it unnecessary or impractical for your company to establish regular feeding facilities?"

37	percent said nearby public facilities were adequate
37	percent said their employees brought their lunch
29	percent said there was insufficient demand by employees
17	percent said they had too few employees
30	percent said they had no space for food services
23	percent said facilities cost too much
16	percent spoke of meal scheduling difficulties
6	percent spoke of maintenance and housekeeping problems
5	percent said they would take too much management time

The Decision in Retrospect

Weighing the good and the bad, most plant executives gave food services a vote of confidence: More than 9 out of 10 said that, given the chance to reconsider the decision, they would again set up employee food facilities (table 20).

> "Considering your plant's experience with these facilities, if you had the decision to make now, would you set up employee feeding facilities?"

94 percent of the executives with on-premise facilities said that if they had it to do over, they would provide food services

6 percent said they would not set up facilities, half of them because of costs

This is not to say, however, that all the original decisions were perfect, or that circumstances have not changed since the food services were set up: Almost half the executives said that they would have done some things differently (table 21).

> "Is there anything you would do differently now than was done when your facilities were set up?"

56 percent said that they would do today just what was done originally

44 percent said they would make some changes

Apparently the most common errors were in physical arrangement of the facilities and in starting too small; for about half of those who would make changes (21 percent of all executives) said they would relocate or change the layout, and about a third (15 percent of the total) would have had larger facilities. It is very possible, of course, that some plants started with adequate facilities but outgrew them, for in response to another question, among 23 percent of plant executives who said they were planning to expand facilities, 21 percent said it was to meet plant expansion (tables 21, 22).

Smaller proportions of executives said they would have started off with better or more varied meals, with more vending machines, with different serving hours, or with higher or lower prices; and others would have come to a different decision than was originally made on whether the facilities should be company-run or contracted -- relatively more in favor of contracted facilities.

Management Comments

Perhaps a better "feel" of the way plant executives evaluate food services can be gained from their own words. Following is a selection of answers to three sets of inquiry:

> "What were the reasons for setting up these feeding facilities? (What were the principal considerations or conditions responsible for setting up these feeding facilities? Any other reasons?)"
>
> "In general, what would you say are the advantages to management of having regular food services for your employees? (Anything else?)"
>
> "What are the drawbacks -- disadvantages to management -- of having these facilities? (Anything else? Any special problems you can think of?)"

Replies to these questions are given below; indented under the advantages are the drawbacks cited by the same executives.

Employee demand -- the lunch period is too short to permit employees to enjoy a hot meal in a nearby restaurant. It keeps employees in the plant.
   No disadvantages I know of.

Employees' lunch wrappers and other articles were being found near chemicals and medicines; this violated the pure food law. Having hot nourishing meals for employees is an advantage. Employees tend to stay on the premises.
   The cafeteria is operated at a loss.

For the convenience and health of employees. There were no adequate restaurants nearby. It makes for healthier and better employees.

It is an additional cost item. The cafeteria is open 24 hours a day, creating more problems for management.

Present methods of bettering labor-management relations stress need for proper upkeep of employee morale. This was the most important factor. However, it was similarly a necessity due to the distance from the nearest feeding facilities and the lunch periods allotted. To be able to serve a hot meal at a reasonable price to the employee and have him return to work in good spirits capable of performing his work properly is our idea and concept of the advantage of having regular food services for the employees.

If a drawback is to be commented on it might be the fact that the firm loses a certain amount of money in subsidizing the catering contractor. However, this factor is easily overlooked when the end result (namely, better employee morale) is taken into consideration.

We take a personal interest in our employees; facilities nearby were not adequate, and we couldn't get a commercial chain restaurant to handle the job outside the plant. The food service gets and maintains the good will of employees.

Cost is a disadvantage, and the responsibility of keeping standards up.

They were set up as a convenience to employees, to improve management-employee relations. We wanted to provide food cheaper than outside restaurants did. It makes for better relations with employees, low cost meals, less time for service and lunch periods.

No disadvantages or drawbacks.

There were inadequate feeding facilities in the vicinity of the plant. Services were established entirely for the convenience of employees.

They take up plant space, and there's some small expense involved.

When the new section of the building was constructed this was included as a convenience for employees as public places were crowded and employees were not able to go home for lunch, in most cases at least. Also it gives a place for the break periods. Helps management-employee relations, and it's good for recruiting if necessary. It provides a place for special meals and social functions, and it's available to employees for special occasions.

Additional responsibility and cost, but these are minor and there are no real drawbacks.

It is company policy to set up in all its plants feeding facilities to provide good food at low cost to employees. Also, at this particular plant it was doubly necessary because no public eating places are near enough to enable employees to eat in the time allowed. Provides good wholesome food at low cost. Also curbs tardiness. These facilities have a good effect on employee-management relationship. Providing good wholesome food contributes to healthier employees.

It is an additional expense that management must absorb. Although there is a concessionnaire here, the company still must purchase and maintain all equipment and facilities. The cafeteria space could be used for other purposes.

To provide nutritious food at a reduced price, and to keep employees healthy and happy. The time element, too -- lunch period doesn't have to be as long. It's considered an employee benefit. We felt that the need existed; good industrial relations are a major goal of our company. It cuts labor turnover, attracts new employees, and it has improved labor relations.

Biggest drawback is cost. Another problem is time required to listen to employee complaints and work out solutions. No major disadvantages.

As an inducement to labor during the period of competition for available labor force; the plant is not centrally located and had some difficulty obtaining new employees. The convenience to the employee promotes better labor-management relations. Also, in this particular plant it facilitates the scheduling of shifts since meal periods can be much shorter than would be possible if employees were required to leave the premises for meals.

It loses money on the lease arrangement since the plant furnishes equipment, utilities, and janitor service.

To provide good hot meals for employees; an employee benefit. Control of personnel; better productivity, better morale.

No drawbacks, as we see it.

Inadequacy of outside facilities. Saves time -- it doesn't cut into production time. Costs are kept down for employees.

Constant expense for equipment which brings no return.

It's company policy; an employee benefit. Gives us control over the lunch period, and provides low cost food, improving employee morale.

We subsidize the concessionnaire, which is an expense; and the cafeteria takes up space that otherwise could be utilized for business purposes.

COMPANY AND CONTRACTOR MANAGEMENT

Incidence of the Two Types

Turning the management of its food services over to a specialist was the choice of most foodserving plants, twice as many having arrangements with outside contractors or concessionnaires as operated their own facilities. A very few had both types of operation on the premises, and another very small proportion had facilities operated by employee clubs or unions (table 3).

65 percent of plant executives said their facilities were operated by contractors or concessionnaires
33 percent said the facilities were company-run
1 percent had both types
1 percent said employee clubs or unions were in charge

Differences among plants of various size-groups were negligible; and regional differences, too, were slight except for the West, which showed less-than-average tendency to rely on contract operation.

There are, however, a few important differences between the types of food services companies operate themselves, and those that are operated for them. A company-run facility is more likely, for example, to be a cafeteria than is a contract-run facility; on the other hand, the contractor is much more likely than the company to operate mobile food carts or such facilities as canteens, lunch counters, or candy stands (table 33).

The following tabulation illustrates this point:

Type of facility	Facilities company-operated	Facilities contract-operated
	Percent	Percent
Cafeterias	92	71
Restaurants with table service	9	8
Mobile food carts	7	27
Canteens, candy stands, lunch counters	5	21
	100	100

From these variations in the composition of the company-operated and contract-operated groups of facilities stem a number of other differences that will be noted in the course of the report.

The Pros and Cons

Generally speaking, plant executives appeared to look more favorably upon contract than upon company operation of food services. Not only had two out of three companies chosen to have their food services run by a contractor, but executives currently using contractors appeared to be better satisfied than executives whose facilities were company-run. Each had its good points and its drawbacks, but relatively more executives found fault with company than with contract operation, and more companies had shifted from the former to the latter (tables 23, 24, 25).

Company operation, according to the executives of companies currently managing their own facilities, has a number of plus factors -- particularly that the company has better control over the facilities, over costs, etc., can provide better menus and lower prices to employees, and has the employees' welfare at heart. A few believed the company can operate at a lower cost or is better qualified to handle food services.

Leading answers of executives of plants with company-run facilities to the questions: "What are the good points of the arrangement you use? What do you particularly like about having your food service operated by your own company?" were:

65 percent said the company had better control over the facilities
48 percent said the company would provide better food
24 percent said the company could control costs better
22 percent said company would charge employees less
20 percent said the company had employee interests at heart
10 percent said the company could operate at a lower cost by using available labor, not paying profit to contractor, etc.
7 percent felt the company had more know-how

On the other hand, many companies found running their own facilities very expensive and overburdened with administrative details. Apparently, ability to control costs or to save on some aspects of the operation sometimes is bought at too high an administrative price for the savings involved.

In answer to the questions: "What are the disadvantages of operating your own food facilities? Is there anything you don't like about it, or prefer about other arrangements?"

70 percent of executives with company-run facilities had one or more criticisms, particularly --

44 percent said the facilities were expensive to operate
43 percent said there were too many administrative details

Along the same line, 31 percent of executives whose companies' facilities now are run by contractors (20 percent of all with food services) said they had changed from company operation. Their reasons, too, revolved around cost and the burden on management.

Three major points stand out in the evaluations executives of plants with contractor-run facilities make of the arrangement:

It relieves plant management of details (78 percent)

The contractor is more experienced in operating food services (39 percent)

The contractor can operate at a lower cost (36 percent)

Compared with the 70 percent of executives with company-run services who were critical, fewer -- 41 percent -- of those with contract operation found some fault with the arrangement.

Major criticisms of contract operation concerned food quality, though a few executives said that even with a contractor responsible the facilities required too much attention from company administrators, and a few said they cost too much. Again, 22 percent of facilities now company-run were formerly in charge of contractors (7 percent of all with food services); the change was made, according to the plant executives involved, largely because of poor food or high costs to management or to employees.

Whatever faults they saw in their arrangements for food service operation were moving few executives to consider changing. When asked, "As far as you know now, do you plan to continue having your feeding facilities operated by your present arrangement, or do you plan to change to another type of arrangement?" only one plant executive interviewed said his company planned to make a change.

FINANCIAL ARRANGEMENTS FOR FOOD SERVICES

General Findings

If company-operated food services were more costly to the company than contracted services, it appeared to be at least in part an outgrowth of the different philosophies animating their financing: Stated company policy in the majority of cases was for the company-run service to operate on a subsidy, for the contractor to operate for profit.

> About 6 in 10 executives of plants with company-run facilities indicated that a financial contribution was made, compared with about 2 in 10 where the facilities were contract-operated.

In the strict sense, however, it appears that few food services were on a truly profit basis, for indirect subsidies in the form of free rent, utilities, and other overhead expenses seemed to be general in contract- as well as company-managed services.

Company-Managed Services

Among executives in plants with company-run food services, 64 percent indicated that it was company policy to subsidize the facilities, and most of them spoke of direct financial aid.

> "Is it your policy to have your plant's feeding facilities operate on a break-even basis, return a profit to your plant, or operate on some form of subsidy?"
>
> (If subsidy): "What form or forms does this subsidy take -- is it a direct money contribution from the company, or is it in terms of not figuring expenses for rent, utilities, or what?"

64 percent said it was company policy for the facilities to operate on a subsidy --
  57 percent a direct money contribution
  7 percent not charging certain expenses
34 percent said the facilities were expected to break even
2 percent said they were expected to show a profit

Many company-run facilities that were not described as subsidized, moreover, did have the benefit of free rent, maintenance and labor, utilities, etc. When the executives (34 percent) who said their plant's facilities were operated on a break-even or profit basis were asked what expenses were charged to the food services:

8 percent said no expenses were charged; and, with some naming more than one type of expense
18 percent said utilities were charged
15 percent said maintenance and labor were charged
12 percent said rent was charged
8 percent charged supplies and equipment depreciation
7 percent cited other expenses charged to the services

Contract-Operated Services

Again often overlooking space and other provisions, the great majority of executives whose facilities were not company-run described their contractors as operating "for profit like any independent business." (Table 26.)

> "What arrangements do you have with the individual or firm that operates your feeding facilities:
> --Do they work on a cost-plus-fixed fee basis?
> --Do they operate the facilities for a profit like any independent business?
> --Does your company guarantee them a minimum profit?"

69 percent said the contractor operated for profit
15 percent said on a guaranteed minimum
9 percent said on cost plus fixed fee
4 percent said on subsidy
1 percent had other arrangements
2 percent did not describe their arrangement

In a fifth of the cases, the arrangement with the contractor resulted in a direct financial contribution from the company (table 27).

21 percent of plant executives with contractor-operated facilities said a direct money contribution was made to the contractor
77 percent said no money contribution was involved
2 percent did not say

The great majority (78 percent) of companies with contract arrangements did not charge the contractor for on-premise expenses incidental to operating the food services. Even contractors described as operating for profit were charged these expenses in only a fourth of the cases (table 28).

22 percent of contract-operated facilities were charged some expense. This applied to --

26 percent of those who were described as operating for profit like an independent business and

6 percent of those with other arrangements, such as guaranteed minimum, cost plus, etc.

Most common charges were rent and utilities, though a few contractors were charged with other expenses.

Among the 22 percent who were charged with some expenses:

13 percent were charged rent
8 percent were charged for utilities
3 percent for maintenance and repairs
2 percent paid a franchise for the privilege of operating the services

Small companies were more likely than others to expect the contractor to operate like an independent business and without a financial contribution, though there was little difference among plants of varying sizes in the proportion charging expenses to the contractor.

OPERATIONS OF FOOD SERVICES

Proportion of Employees Served

Few food service managers claim to provide meals for the bulk of their plants' employees: Only about a fifth of those interviewed said that they believed that as many as three-fourths of the employees ate meals in their food services on a normal day; the average (median) estimate was in the neighborhood of 50 percent (table 41).

These estimates are rough, no doubt, but representing as they do the kind of "feel" upon which meal plans are based by managers of many types of food facilities, they probably provide as reliable an index as is available of the coverage that employee food services provide so far as meals are concerned. They do not take into account the employees who drop in for a snack or dessert or beverage; undoubtedly the coverage of food facilities is much wider -- perhaps in many cases almost universal -- when these are included.

> When all facility managers interviewed were asked: "About what percentage of your plant's employees would you estimate eat meals in your food services on an average day?"
>
> 19 percent estimated that fewer than 25 percent ate meals
> 18 percent estimated from 25 to 39 percent
> 21 percent estimated from 40 to 59 percent
> 18 percent estimated from 60 to 74 percent
> 22 percent estimated 75 percent or more ate meals
> 2 percent could not estimate

Managers of company-operated facilities, with a median estimate of 62 percent, indicated wider mealtime coverage than did contract managers, with 45 percent. It will be remembered that cafeterias represented a larger share of company than of contract operations.

Types of Services Provided

Cafeterias were by far the most common type of food facility available to employees of manufacturing plants, outnumbering by a large margin mobile food carts, restaurants with table service, or such other installations as canteens, lunch counters, or candy stands. About 8 in 10 plants had cafeterias compared with 2 in 10 with mobile carts, the next most widespread type (table 33).

> Among all plants with food services:
>
> 78 percent had cafeterias
> 20 percent had mobile food carts
> 16 percent had canteens, candy stands or lunch counters
> 8 percent had restaurants with table service

So far as size of plant goes, the major differences appeared to be that larger foodserving plants had more facilities, particularly more cafeterias, than smaller plants: Cafeterias were reported to be among the services of 90 percent of the large plants, 78 percent of the medium, and 65 percent of the small plants. There were only slight differences by size of plant in the proportions reporting having other kinds of food facilities.

From their predominance among food services, it follows that cafeterias were very often the only kind of food facility in a plant. Three out of four plants that had cafeterias had no other type of food service; those with other facilities were less likely to rely on one type of service.

Among all plants with food services:

61 percent had cafeterias alone,
17 percent had cafeterias along with other facilities

7 percent had only mobile carts,
13 percent had mobile carts along with other types

10 percent had only canteens, candy stands, or lunch counters,
6 percent had this type along with other types

3 percent had only restaurants,
5 percent had these in combination with other types

In most of the plants where cafeterias existed, they were reported to be the most important food facility. In all, about three out of four facility managers said that the largest number of employees was served by cafeterias (table 34).

Among all plants with food services:

73 percent of facility managers said the largest number of employees got their food in cafeterias
12 percent said canteens, candy stands, or lunch counters provided widest coverage
11 percent said this of mobile carts, and
4 percent of restaurants

For coffee breaks, mobile carts and the canteen type of facility played a relatively larger role; but here again the cafeteria's predominance in the total picture made it the most important scene of the between-meal snack (table 35).

About 3 out of 10 plants that had food services either did not permit coffee breaks or did not open regular services at coffee time.

Among all plants with food services:

- 13 percent of facility managers said no coffee breaks were allowed
- 15 percent said no facilities were open for coffee breaks
- 72 percent indicated that one or more facilities were open --
  - 53 percent said cafeterias were open for coffee breaks
  - 13 percent said mobile carts were available
  - 12 percent said canteens, candy stands, or lunch counters were available
  - 3 percent said restaurants were open

Vending machines were reported to be the principal resource in plants that allowed coffee breaks but did not open regular facilities at these times. In the 15 percent of plants with food services not open during allowed coffee breaks, almost all the facility managers said employees got their snacks at vending machines. A few said employees used employee clubs or lounges or a coffee bar, or sent outside the plant.

Meals Served

The noon meal was practically universal in industrial food services, and 4 out of 10 or more provided a morning and/or evening meal period in addition. Smaller proportions served in the afternoon or early morning, or at midnight (table 36).

Among all plants with food services:

- 98 percent served at noon (that is, sometime during the period 10 AM to 2 PM)
- 46 percent served in the morning (defined as 6 - 10 AM)
- 40 percent served in the evening (6 - 10 PM)
- 17 percent served in the afternoon (2 - 6 PM)
- 14 percent served in early morning (2 - 6 AM)
- 12 percent served at midnight (10 PM - 2 AM)

Except among small plants and plants in the Northeast, only a minority confined themselves to one meal period a day -- in almost all cases, the noon meal. Many plants served two or three times a day, and a few served more often or were open continuously. In some cases, no doubt, these periods were devoted to snacks rather than actual meals.

Among all plants with food services:

37 percent served one period
28 percent served twice
35 percent served three or more periods

The larger the plant, the more meal periods it was likely to be open.

Serving two or more times was reported by:

42 percent of small plants with food services
68 percent of medium plants
78 percent of large plants

Serving three or more times was reported by:

15 percent of small plants
34 percent of medium plants
56 percent of large plants

Facility managers in the South reported on the average being open for more periods than other sections.

Serving two or more times was reported by:

50 percent of plants in the Northeast with food services
63 percent in the North Central States
68 percent in the West
77 percent in the South

Serving three or more times was reported by:

30 percent of plants in the North
39 percent in the West
48 percent in the South

Types of Menus

In their chief food service, usually the cafeteria, about 5 out of 10 plants offered their employees a choice between a la carte foods and budget meals or special plates, where a combination of foods could be bought for less than the price of its components. An additional 4 in 10 had only a la carte menus, and 1 in 10 only budget meals or special plates -- a total of 9 in 10 with a la carte menus, 6 in 10 with budget meals (table 39).

Where meals were provided chiefly from mobile carts or from canteens, candy stands, or lunch counters, only 4 in 10 had budget meals, usually in combination with a la carte foods, and 6 in 10 were restricted to a la carte menus.

Small plants and Southern plants were more likely than others to have only a la carte menus, and Western plants more likely than others to concentrate on budget meals.

Free Food

About one food service manager in 100 said that all foods were provided free to employees, and an additional 6 percent indicated that some foods -- largely coffee and other beverages -- were provided free of cost regardless of whether or not other food was bought. In a few plants, notably in the West, free meals were provided for overtime workers (table 40).

Milk

In practically all plants milk was available to employees at all meal periods, and in 9 out of 10 plants with coffee breaks it was available then also (tables 37 and 38).

Butcher Shops

Butcher shops -- that is, butcher's block or other means of cutting up wholesale cuts of meat -- were operated in about one in five (21 percent) of the plants with food facilities (table 42).

Such facilities were more common in large plants and in plants in the South and West, where they were reported in about 3 out of 10 facilities, than in smaller plants or those in other sections (with fewer than 2 in 10).

Ice Cream Facilities

Special facilities for making ice cream were rarely found in the plants surveyed. Four percent of the large companies reported having such facilities, and the national average was only 2 percent (table 43).

Zero-Freezer Space for Food

From the testimony of food facility managers, it appears that the use of frozen food was widespread at the time of the survey, and likely to increase.

Three facility managers in four indicated that their plant had zero-freezer space other than that for ice cream, and on the average (median) those with space had about 21 cubic feet. Differences among regions were minor except that somewhat fewer Northeastern plants had such space. The proportion of plants with zero space, and the amount of space, naturally increased sharply with size of plant (table 45).

> Among small plants with food services, 67 percent of facility managers reported an average of 10 cubic feet of zero-freezer space. In medium-sized plants, 72 percent of managers reported an average of 18 cubic feet; and in large plants, 85 percent of managers reported an average of 37 cubic feet.

Among all plants with zero-freezer space, about 2 facility managers in 10 -- but about 3 in 10 in the Northeast and among small plants -- said they planned to add to this space in the next year or two (table 46).

18 percent said they planned to increase zero space
71 percent said they planned no changes
11 percent were uncertain

This increased opportunity for frozen food storage was related not alone to plant or facility expansion; the most important proportion came from the simple wish to increase the use of frozen foods, partly to take advantage of quantity discounts.

> Among the plants whose facility managers said they planned to increase zero-freezer space:

53 percent said they wanted to use more frozen foods
38 percent said the plant was expanding
11 percent said they wanted to take advantage of quantity discounts
4 percent were remodeling the food services
4 percent planned to prepare their own frozen foods

On-Premise Baking

About two out of five food facilities did some on-premise baking, producing a variety of foods. Cakes, pies, quick breads, yeast rolls, and cookies headed the list, with yeast breads, doughnuts, and other types coming from the ovens of fewer plants (table 44).

Among all plants with food services:

58 percent of facility managers said they did not bake regularly
42 percent said they did produce some baked goods regularly --

32 percent cakes
30 percent pies
22 percent muffins, biscuits, cornbread, and other quick breads
17 percent yeast rolls
16 percent cookies
7 percent yeast breads
4 percent doughnuts
6 percent a variety of other baked goods

Major variations by section of the country were that fewer plants in the Northeast baked -- about a fourth, compared with about half in the other regions; and that higher proportions of Western plants baked cakes, higher proportions of Southern plants baked pies and quick breads.

Size of plant was strongly related to baking patterns, large plants having twice as large a proportion doing on-premise baking as small plants did.

58 percent of large-plant facility managers said their plants did on-premise baking, compared with
44 percent of medium and
27 percent of small-plant managers

Employees of companies that ran their own facilities were somewhat more likely (51 percent) to be served baked goods produced on the premises than were those of contractor-run services (40 percent).

Convenience Foods

Efforts by manufacturers and processors to simplify the preparation of food in the ultimate kitchen have found a favorable response in industrial food services: Most of them used partially prepared foods in some or many forms, and facility managers found more to praise than to criticize about them.

Among all facility managers, about 8 in 10 found some advantages in using partially prepared foods, compared with about 6 in 10 who saw disadvantages. These convenience foods fared relatively better with large plants than small; while facility managers in large plants were more likely than those in small plants to name advantages, there was little difference in the proportions who gave criticisms (tables 63, 64).

> "During the past few years, there has become available an increasing number and variety of foods which require less preparation in the institutional kitchen -- for example, cake and roll mixes; instant desserts and instant beverages; instant nonfat solids (dry milk); prepeeled potatoes; portion-size meats; and ready-to-heat-and-eat frozen foods.
>
> "What advantages are there in using these partially-prepared foods in an operation like yours? Are there any other things you like about using them?"
>
> 77 percent of facility managers named advantages; these included --
>
> 69 percent in small plants
> 74 percent in medium plants
> 86 percent in large plants
>
> "What disadvantages do you see in using them? What don't you like about using them?"
>
> 58 percent of facility managers had some criticism; these included --
>
> 53 percent in small plants
> 59 percent in medium plants
> 60 percent in large plants

Take less time and less work, make less waste -- these are the major advantages partially prepared foods offer their operation, according to from a fourth to almost half the facility managers. Somewhat down the scale came such qualities as more uniformity, money saving (though this is no doubt implicit in other statements), and saving of storage space; and small proportions advanced other reasons for using these convenience foods (table 63).

Among all facility managers (77 percent of whom named advantages):

44 percent said these foods save time
43 percent said they save labor
25 percent said they provide better control; less waste
15 percent said they make for uniformity in size and quality
12 percent said they save money
10 percent said they save storage space
7 percent said they are good for emergencies
4 percent simply said they were convenient
4 percent said they reduce equipment needs
3 percent said they permit more varied menus
3 percent said they reduce cooking failures
2 percent said they keep better

On the other hand, the major drawbacks to the use of such foods were high price, low quality generally, and more specifically, poor flavor or texture. A few made other criticisms (table 64).

Among all facility managers (58 percent of whom made criticisms):

31 percent said partially prepared foods were high priced
19 percent said they were low quality
15 percent said they had poor flavor or texture
4 percent said they required extra storage space
3 percent said they deteriorate in storage
2 percent said they had not enough variety
2 percent said portion sizes were inconvenient

BUYING FOR FOOD SERVICES

Amounts Spent for Food

From a combination of inventory and purchase records, it is estimated that the roughly 6,000 plants in the Nation represented by those studied for this report spent in the neighborhood of $20 million for the food used in a 4-week period in January-February 1956 (table 65). If spending for this period is assumed to be typical, the estimated amount for the year would be close to $260 million.

The lion's share of this expenditure -- about 70 percent -- came from plants with 1,000 or more employees, although plants of this size comprised only about a third of those with food services. Medium-sized plants, representing another third of plants with facilities, bought about 20 percent of the dollar value of food sold to plants with food services, and the small plants about 10 percent.

So far as region of the country goes, food expenditures were in line with the proportion of plants in each region:

The North Central States, with about 40 percent of the plants with facilities, spent about 43 cents of the plant food dollar

The Northeast, with 30 percent of the plants, spent 27 cents of this food dollar

The South had 24 percent of the plants, spent 24 cents

The West represented about 6 percent both of the plants and of food expenditures

This relationship was no doubt a result of differences canceling out; for, as evidenced in this and other reports on these food services, the sections of the country varied markedly in a number of determinants of food expenditure, such as size of plant, operating procedures, percentage of employees eating meals, etc.

As with the regional picture, differences in operation between company- and contract-run services also apparently came close to balancing out, for:

Company-run services, representing about 36 percent of the plants with food services studied, spent about 40 percent of the plant food dollar

Contract-run services represented 64 percent of the plants and accounted for the remaining 60 percent of the food dollar

Expenditures by Food Types

The largest shares of the inplant food service dollar in January-February 1956 went for dairy and for meat products -- about a fifth of the dollar for each. Other high-expenditure food groups were bakery products, beverages, and fruits and vegetables.

Following is the way the food dollar spent by the plants was divided during the 4-week survey period:

22 cents for dairy products (excluding butter)
21 cents for meat and meat products (about half beef, a third pork)
16 cents for bakery products, flour and cereals
12 cents for beverages (excluding milk)
12 cents for fruits and vegetables (including juices)
3 cents for fats and oils (including butter)
3 cents for sugar and other sweets
2 cents went for poultry and poultry products
2 cents to fish and seafood
2 cents for eggs
5 cents for all other foods

Purchasing Criteria

Grades and standards, brand names, and personal inspection all play an important part in their selection of foods, according to the food service managers interviewed.

All food service managers interviewed were shown a list of buying methods and asked to indicate how they chose each of a number of foods. Included on the list was "U. S. Grade." Many managers cited this as a factor in their selection of such items as fresh and frozen meat and poultry; however, a number also cited it for a wider range of items in such a way as to suggest that in many cases they were thinking simply in terms of quality standards generally, whether applied by government, association, processor, or other agency.

Another term on the list, "personal inspection," also was used rather loosely -- of such items as canned food in a few instances, for example -- indicating probably less the kind of critical examination usually associated with the term than simply the fact of personal participation in the transaction.

From the listing of the purchasing criteria most widely mentioned, it appears that brand name ranked first in the choice of most packaged items, grades and standards or personal inspection in most fresh items (table 58).

Meat

Fresh: Grade, brand name
Frozen: Grade, brand name
Canned: Brand, grade

Poultry

Fresh: Grade, inspection, brand name
Frozen: Grade, brand, inspection
Canned: Brand

Fish and shellfish

Fresh: Inspection, brand, grade
Frozen: Brand, inspection, grade
Canned: Brand

Fruits and vegetables

Fresh: Inspection, grade
Frozen: Brand
Canned: Brand, grade

Fluid milk and cream: Brand, grade

Butter: Brand, grade

Margarine: Brand, grade

Lard and shortening: Brand, grade

Bakery products: Brand, inspection

Flour: Brand

Sugar: Brand, grade

Sources of Supply

For most commodities, the typical food service manager said he dealt with a single type of supplier -- wholesaler or packer or processor or retailer -- rather than a combination of types, though he might use more than one company of a type. Meat was an exception to the general rule, with two out of five purchasers buying from more than one type of supplier. Most suppliers were on the wholesale level; the retail store came into the picture largely for small plants, but even among these it ranked at best a poor second (tables 47 - 57).

The major sources of supply cited by purchasers (as distinguished from those few who ordered from central commissaries or, for some products, made their own) of the various commodities were as follows:

Three principal sources of supply were cited for meats -- hotel or restaurant supply houses, packing plants, and packer-owned branch houses -- each named by more than 3 out of 10 purchasers. About 2 in 10 said they bought some of their meat from retail stores, with a range from 7 percent for large plants to 27 percent for small plants (table 48).

The wholesaler-jobber, used by 7 out of every 10, was by far the leading supplier of poultry to the inplant food services. Far down the line came the processor, named by about 2 in 10, and the retail store, 1 in 10 (table 49).

Fish and seafood were supplied to 8 in 10 purchasers by secondary wholesalers (dealers away from the docks). Retail stores, primary wholesalers (boats at the dock), processors, and canners each were used by small proportions (1 in 10 or fewer) (table 50).

For fruits and vegetables, wholesale purchase was the rule, applying to about 8 or 9 out of 10 purchasers of the fresh, canned, and frozen products. The retail store made its best showing in fresh vegetables, which it supplied to 2 out of 10 purchasers, with a range from 7 percent of those in large plants to 32 percent of those in small plants (tables 51, 52, 53).

Fresh eggs were supplied by the wholesaler-jobber to 60 percent of the purchasing plants, by the retail store to 14 percent, by brokers to 13 percent, and by farmers, cooperatives, and country assemblers to smaller groups (table 55).

The wholesaler-jobber supplied flour to 8 in 10 plants, and the retail store to 1 in 10. Practically no large plants bought flour from retail stores -- their second source of supply was the manufacturer -- but 2 out of 10 small plants used this outlet (table 56).

For fats and oils other than butter, about 7 in 10 purchasers went to wholesalers, 2 in 10 to manufacturers' branch houses, 1 in 10 to retail stores. The larger the plant, the more likely it was to buy from the branch houses; the reverse was true of the retail store (table 57).

Terms of Payment

The open book account appeared to be the norm for food service arrangements with suppliers, outstripping cash terms by a wide margin. Depending on the product, 7 or 8 out of 10 purchasers paid on open book, usually net 30 days or net 7 days; where discounts were taken, they tended to be on staples such as canned goods and flour (table 59).

Food service managers were asked their usual method of payment for the following list of items:

Meat
Poultry
Fresh fish and shellfish
Canned fish and shellfish
Frozen fish and shellfish
Fresh fruits and vegetables
Canned fruits and vegetables
Frozen fruits and vegetables
Fluid milk
Flour
Bakery products
Butter
Margarine

Cash or C.O.D. payment varied from 11 percent to 23 percent of the purchasers, depending on the commodity.

From 71 to 83 percent of purchasers said they bought on open book account. This included:

27 to 34 percent net 30 days
9 to 23 percent net 7 days
7 to 11 percent other net terms
2 to 17 percent discount terms

For most items, only from 2 percent to 5 percent of purchasers reported that discounts were allowed; but 17 percent said they were allowed discounts on canned fruits and vegetables, and 10 percent each named flour and canned fish or shellfish as a discount item.

Attitudes toward Suppliers

Food service managers appeared to be generally very well pleased with the goods and services they were getting from their food suppliers. Most of them cited some special service that particularly impressed them and, while some had been dissatisfied enough to change suppliers in the past, the majority had no complaints about those they were currently using (tables 60, 61).

Food service managers were given two opportunities to criticize their suppliers:

> "In general, are you satisfied with the products or services of your food suppliers, or are you dissatisfied in any way?"
>
> "Have you ever had to change suppliers because you were dissatisfied with their products or services?"

42 percent said they had no complaints about either present or former suppliers
23 percent had no current complaints but had been dissatisfied with former suppliers
35 percent did have some current dissatisfaction

On the other hand, asked for commendation of suppliers:

> "Can you think of any special services any of your suppliers provide that you particularly like?"
>
> 77 percent found something praiseworthy
> 23 percent could think of nothing outstanding

Criticisms centered, not unexpectedly, on quality, delivery, and price factors. A few managers complained that some suppliers were untrustworthy, misrepresented their product, or did not stand back of it (table 60).

Among the 58 percent of food managers who criticized either present or former suppliers --

32 percent spoke of poor quality, inferior quality, or below-standard merchandise
7 percent said merchandise was not fresh
5 percent received damaged merchandise

23 percent complained of unsatisfactory delivery

22 percent said prices were too high, out of line

11 percent complained of untrustworthy suppliers or salesmen

11 percent said service was poor in general

6 percent said some suppliers did not have enough variety in stock

On the positive side, too, delivery and quality were important, though only a few managers mentioned price as a special virtue of their suppliers. Many managers appeared to single out as "special services" practices considered routine in most business, such as "good" or "prompt" delivery, "good quality" food (table 61).

Among the 77 percent of food service managers who spoke of special services provided by their suppliers --

31 percent praised special delivery, delivery on short notice, extra-prompt service
16 percent spoke of good delivery, daily delivery, regular delivery
5 percent said merchandise was carried into the plant

19 percent spoke of generally good service, "they serve us well"

13 percent singled out the good quality of the food supplied

9 percent said some suppliers provided special packaging or special cuts for them
6 percent said they received help in planning menus
4 percent said salesmen would make the coffee for the plant, help at special functions, go out of their way to give special service

5 percent praised pricing policies

5 percent said suppliers were reliable; stood back of their products, had good adjustment policies

Food service managers were inclined to praise in more general terms than they criticized: About half of those speaking of special services did not have a specific supplier or type of supplier in mind, while the great bulk of those with criticisms did speak specifically (table 62).

Apparently, these managers were more concerned about the purchase of meat than about other products, for meat dealers led the list both of the praised and the criticized suppliers.

> Out of the 58 percent of food service managers who criticized suppliers, 45 percent named a type of supplier -- 35 percent the meat dealer.
>
> Out of the 77 percent of food service managers who praised suppliers, 38 percent named a type of supplier -- 25 percent the meat dealer.

Other suppliers criticized by 10 percent or more of the food service managers were those dealing in:

Fresh produce	17 percent
Bakery products	12 percent
Milk and dairy	12 percent
Eggs	11 percent

The runner-up to meat suppliers' 25 percent in the group singled out for special praise was the supplier of milk and dairy products, 10 percent.

VENDING MACHINES IN PLANTS WITH 250 OR MORE EMPLOYEES

VENDING MACHINE OPERATION

Incidence of Vending Machines

About 9 out of every 10 plants with 250 or more employees were making beverages or food available in vending machines. This group included virtually all of the plants with food facilities, for few operated food services alone (table 1).

Among the major-sample plants interviewed by telephone:

48 percent had both food services and vending machines
40 percent had only vending machines

4 percent had food services but no vending machines
8 percent had neither food services nor vending

If a plant vended at all, it was almost certain to have beverage machines. In addition, about 6 out of 10 vending plants had some type of food, and 3 in 10 vended milk (table 2).

Executives telephoned for the major sample were asked:

"Are there any food vending machines in your plant?"
"Are there any milk vending machines in your plant?"
"Are there any other beverage vending machines in your plant?"

About one in eight (12 percent) said there were no vending machines in the plant. Among the remainder:

95 percent said there were beverage vending machines
58 percent said there were food vending machines
33 percent said there were milk vending machines

It is apparent from the above that very few vending plants confined themselves to one type of machine. Actually, about a fourth of them made all three -- food, milk, and other beverages -- available in vending machines (table 2).

Among all plants with vending machines:

4 percent served food only
1 percent served milk only
32 percent served other beverages only

31 percent served both food and beverages
9 percent served both milk and other beverages
23 percent served all three

Size of Plant

So far as size of plant goes, small plants were about as likely as large plants to have vending machines, and to vend beverages. They were, however, less likely to have food or milk vending machines, and also less likely to provide a variety of types (tables 1, 2).

Among plants with 250 to 499 employees, 88 percent had vending machines. Of those with vending machines --

55 percent vended some type of food
30 percent vended milk
95 percent vended other beverages

18 percent vended all three

Among plants with 1,000 or more employees, 86 percent had vending machines. Of those with vending machines --

64 percent vended food
38 percent vended milk
95 percent vended other beverages

29 percent vended all three

Region

By section of the country, too, there was little difference in the proportions of plants with vending machines, except that the West, with 77 percent, was somewhat below the national average of 88 percent. In both the South and the West, however, unlike the Northern States, majority tendency of vending plants was to provide only beverages, with less attention to food or milk (tables 1, 2).

Among vending plants, the proportions serving only beverages through this medium were:

62 percent in the West
52 percent in the South
27 percent in the Northeast
20 percent in the North Central region

Proportions serving vended food were 70 percent and 58 percent in the North Central and Northeastern regions, compared with 43 percent and 34 percent in the South and West. Proportions vending milk were 44 percent and 35 percent in Northeastern and North Central States but 18 percent and 14 percent in the South and West.

Plants With and Without Food Services

Vending machines appeared to play a larger role in plants without food services than in the plants that had nonautomatic forms of service -- although nonserving plants were a little less likely to have vending machines, those that did tended to have more extensive installations (tables 2, 4).

Among plants with food services, 92 percent had vending machines. Of these:

56 percent vended food
25 percent vended milk
93 percent vended other beverages

16 percent vended all three

Among plants without food services, 83 percent had vending machines. Of these:

60 percent vended food
43 percent vended milk
95 percent vended other beverages

30 percent vended all three

Getting down to more detail in the later personal interviews, the survey indicates that soft drinks and such items as candy, peanuts, or gum were purveyed by the overwhelming majority of plants with vending machines, regardless of the provision of regular food services; and that most other items were more likely to be found in plants without food services (table 29).

The following comparison of items vended by plants with and without food services indicates the greater reliance of the latter on the vending machines for such items as milk, coffee, baked goods, ice cream, fruit juices, sandwiches, and soup.

Item	Food services Have	 Do not have
	Percent	Percent
Soft drinks	90	94
Candy, peanuts, or gum	81	80
Coffee	39	55
Milk	25	43
Cookies	19	33
Ice cream	18	29
Hot chocolate	8	11
Fruit juices	5	14
Sandwiches	2	12
Pastry, pie, cake	2	11
Soup	2	9
Fruit	1	5

Among plants with food services, there was little difference between company-operated and contractor-operated services either in the proportions having vending machines or in the kinds of items vended (tables 4, 29).

Plans for the Future

The plans of vending machine users at the time of the survey were far more in the direction of increasing than of decreasing operations. In plants with vending machines, about one executive in five said his company expected to change the number and types of vending machines in operation, and most of them talked of increases. Plans of companies with food services and without were roughly similar (table 30).

In plants with both food services and vending machines:

79 percent of executives said they planned no changes
21 percent did plan one or more changes --

13 percent planned to add new types of machines
10 percent planned increases in current types
2 percent planned decreases

Plans for increases in vending machine coverage were scattered over a variety of items, none mentioned by more than 8 percent of the executives. Leading the list were coffee, milk, and soft drinks (table 30).

MANAGEMENT APPRAISALS OF VENDING MACHINES

Apparently not an unmixed blessing, vending machines were praised by the great majority of plant executives, but were criticized by almost as many. About 9 out of 10 executives saw some advantages in vending machines, about 8 out of 10 saw some disadvantages. (In the case of food services, about 7 in 10 operators saw disadvantages.) (Tables 18, 31, 32.)

Major plusses for vending machines were the belief that they are an employee benefit and improve morale, and that they keep employees near the job (table 31).

Among executives of plants with both food facilities and vending machines:

59 percent said vending machines were a morale builder
38 percent said they saved production time by keeping employees near the job
20 percent said they supplemented other food services
10 percent considered that they provided an employee pickup
9 percent said they cost less than other food services
5 percent said they produced revenue
4 percent said outside operators had all the responsibility

The employee morale factor was especially important to the small plants with food facilities (64 percent) and to plants without food services (67 percent).

The two topranking criticisms of vending machines were internal -- that they cause housekeeping problems when employees leave bottles, wrappings, and other litter about, and that employees spend too much time at the machines. An important third in the list, however, was the problem of unreliable servicing of the machines (table 32).

Among executives of plants with both food facilities and vending machines:

43 percent complained of housekeeping problems
30 percent said too much time was lost at machines
26 percent said machine servicing was unreliable
9 percent complained of vandalism or pilferage
7 percent said the machines took too much space
2 percent said machines competed with other services
2 percent were bothered by employee complaints

PLANTS WITH 100 to 249 EMPLOYEES

FOOD SERVICES

In this sample of smaller plants, about a fifth of the executives said their companies provided some form of food service, exclusive of vending machines, for their employees. This was, as expected, a much lower proportion than was reported by larger plants.

According to plant executives, food services were provided by:

19 percent of plants with 100 to 249 employees.
This compares with:
37 percent of plants with 250 to 499 employees
59 percent of plants with 500 to 999 employees
72 percent of plants with 1,000 or more employees

Although the number of plants with food services -- 31 -- in this smaller plant sample is too small for definitive conclusions and no percentaged tables are shown, a few generalizations appear tenable.

Compared with larger plants:

--Cafeterias played a somewhat smaller role, mobile food carts a somewhat larger role, in the food-service setups of these smaller plants.

--Far fewer reported serving more than one meal. Practically all served lunch, a very few served breakfast, and none reported other meals.

--The proportion of contractor- to company-operated food services in the smaller plants was similar (almost two to one). There was no indication of plans to change form of operation.

--Smaller plant executives saw generally similar advantages and disadvantages in having on-premise food services, and took a generally similar position on setting up such services if they had the choice to make again.

--The establishment of food services in these plants appeared to be more recent, the great majority being postwar.

Among smaller plants without food services, it appears that:

- --About 1 in 25 had at one time had food services but had discontinued them.
- --In about 1 in 50 the executive interviewed thought his company might establish food services in the next year or two.
- --The major reasons for not having food services were: Adequacy of eating facilities in the area, employees' bringing their own lunch, and lack of space.

VENDING MACHINES

A little more than 8 in 10 -- 83 percent -- of the smaller plants provided vending machines for their employees, according to the plant executives interviewed. This figure is very like the 88 percent reported for larger plants.

As was true with larger plants, soft drinks and such items as candy, peanuts, and gum were the most widely vended. Generally speaking, however, these smaller plants appeared to have less extensive vending installations than the larger plants. (See page 48 or table 29 for comparative figures.)

Among plants with 100 to 249 employees that had vending machines:

81 percent vended soft drinks
52 percent vended candy, peanuts, or gum
29 percent vended milk
28 percent vended coffee
8 percent vended cookies
7 percent vended ice cream
6 percent vended hot chocolate
5 percent vended fruit juices
5 percent vended pastry, pie, or cake
2 percent vended sandwiches
1 percent vended soup

APPENDIX

Note on the Sampling Error

The sampling errors shown in the table below have been calculated on the basis of a simple random sample and the resulting variances increased by 10 percent to reflect the effects of clustering.

The sampling variability is shown in percentage points for various proportions and for samples of varying sizes.

Reliability of Estimates
(Within "0.95" Confidence Limits)
(Sampling Variability in Percentage Points)

Proportion in sample	Base on which percentage is calculated							
	50	75	100	200	300	400	500	800
5 and 95 percent -	7	6	5	3	3	3	2	2
10 and 90 percent -	9	7	6	4	4	3	3	2
20 and 80 percent -	12	10	9	6	5	4	4	3
30 and 70 percent -	14	11	10	7	6	5	4	3
40 and 60 percent -	15	12	11	8	6	5	5	4
50 percent --------	15	12	11	8	6	5	5	4

Using the statistical sampling errors shown in this table, the sampling variability of any particular estimate may be stated. For example, it is estimated from the sample that 52 percent of the 825 sample plants with 250 or more employees have food services. If a full census had been made, using the survey materials and procedures, the "true" figure would be, in approximately 19 cases out of 20, within the interval 52 percent plus-or-minus 4 percentage points; i.e., in the range 48 to 56 percent.

Tables

In the following tables are presented the percentage distributions of answers to the questions asked of plant executives and food service managers in plants with 250 or more employees. It should be noted that, except for table 65, all percentages shown are based on data weighted to reflect the size and regional distribution of the universe from which the sample was drawn, but the numbers of plants shown are the actual number whose executives were interviewed.

The tables are presented in the general order in which the questioning was put, as follows:

Tables 1 - 6 are derived from preliminary telephone interviews with plant managers. These were "screening" interviews, designed to learn incidence of food and vending services and related information, as well as to adjust the sampling data for changes in employee size between 1953 and 1956 (825 plants).

Tables 7 - 32 are derived from more intensive personal interviews with plant managers. The order of questioning is that put to managers of plants with food services. Identical questions asked managers of non-serving plants are shown in the same table, and questions along similar lines are interleaved as the subject matter dictates. (Interviews with managers in 391 plants with services, 77 plants without.)

Tables 33 - 64 are derived from intensive personal interviews with food service managers (378 plants).

Table 65 is based on food inventory and purchase record data. It shows the numbers of plants in the universe estimated from the sample, and the amounts estimated to have been spent by these plants for food used in a 4-week January-February 1956 period.

Table 1.--Incidence of food facilities and vending machines in manufacturing plants with 250 or more employees

Plant characteristics	Food facilities only	Vending machines only	Both food and vending	Neither food nor vending	Total with:		Plants
					Food facilities	Vending machines	
	Percent	Percent	Percent	Percent	Percent	Percent	Number
United States total --	4	40	48	8	52	88	825
Employee size group:							
1,000 or more ------	7	21	65	7	72	86	325
500 to 999 ---------	6	35	53	6	59	88	220
250 to 499 ---------	2	53	35	10	37	88	280
Region:							
Northeast ----------	5	46	39	10	44	85	275
North Central ------	3	37	54	6	57	91	270
South --------------	5	32	57	6	62	89	163
West ---------------	6	45	32	17	38	77	117

Table 2.--Plants with vending machines: Types of vending machines operated

Plant characteristics	Food only	Milk only	Other beverages only	Food and milk	Food and other beverages	Milk and other beverages	All three	Total vending: Food 1/	Total vending: Milk	Total vending: Other beverages	Plants
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Number
United States total	4	1	32	2/*	31	9	23	58	33	95	713
Employee size group:											
1,000 or more ----	3	1	28	1	31	7	29	64	38	95	281
500 to 999 -------	4	2	36	*	27	6	25	56	33	94	190
250 to 499 -------	5	--	33	--	32	12	18	55	30	95	242
Region:											
Northeast --------	4	1	27	--	25	14	29	58	44	95	229
North Central ----	6	1	20	1	39	9	24	70	35	92	248
South ------------	1	1	52	--	29	4	13	43	18	98	142
West -------------	10	--	62	--	14	4	10	34	14	90	94
Food facilities:											
Have food facilities ------	5	1	36	1	34	7	16	56	25	93	422
Do not have food facilities ------	4	1	27	--	26	12	30	60	43	95	291

1/ The term "food" was not defined for respondents in these telephone interviews. Apparently some respondents included such items as candy in this category, for later interviews disclosed smaller proportions in some groups actually vending soup, sandwiches, pastries, etc. (See table 29.)

2/ Asterisk indicates less than 0.5 percent.

Table 3.--Plants with food facilities: "Are these feeding facilities operated directly by your own company, by an outside concessionaire or catering organization, or do you have some other arrangement?"

Plant characteristics	Company operated	Contractor operated	Both company and contractor operated	Employee clubs, unions	Plants
	Percent	Percent	Percent	Percent	Number
United States total	33	65	1	1	471
Employee size group:					
1,000 or more ----	33	66	1	--	237
500 to 999 -------	35	64	1	1/*	128
250 to 499 -------	31	67	--	2	106
Region:					
Northeast --------	36	64	--	--	133
North Central ----	29	70	--	1	176
South ------------	35	64	1	--	103
West -------------	38	52	5	5	59

1/ Asterisk indicates less than 0.5 percent.

Table 4.--Relation between food facilities and incidence of vending machines in manufacturing plants with 250 or more employees

Plant characteristics	Have vending machines	Do not have vending machines	Plants
	Percent	Percent	Number
United States total ----------	88	12	825
Food facilities:			
Have food facilities -------	92	8	471
Do not have food facilities	83	17	354
Form of operation of food facilities:			
Company operated -----------	89	11	151
Contractor operated --------	93	7	320

Table 5.--Plants without food facilities: "In recent years, has your company had regular feeding facilities for employees at this plant?"

Plant characteristics	Have had food facilities	Have never had food facilities	Not ascertained	Plants
	Percent	Percent	Percent	Number
United States total -	21	74	5	354
Employee size group:				
1,000 or more -----	25	65	10	88
500 to 999 --------	18	76	6	92
250 to 499 --------	20	77	3	174
Region:				
Northeast ---------	20	73	7	142
North Central -----	23	72	5	94
South -------------	16	82	2	60
West --------------	22	76	2	58
Vending machine operation:				
Have vending machines ---------	21	75	4	291
Do not have vending machines ---------	20	70	10	63

Table 6.--Plants without food facilities: "Does your company have any definite plans to establish any feeding facilities for employees at this plant in the next year or two?" (If "yes"): "What type of facilities do you think will be offered?"

Plant characteristics	Plans		Type of facility planned			Plants
	No definite plans	Plan to establish food facility	Cafeteria	Mobile carts	Other	
	Percent	Percent	Percent	Percent	Percent	Number
United States total -	95	5	2	2	1	354
Employee size group:						
1,000 or more -----	96	4	2	--	2	88
500 to 999 --------	96	4	4	--	--	92
250 to 499 --------	93	7	2	3	2	174
Region:						
Northeast ---------	95	5	--	4	1	142
North Central -----	96	4	4	--	1/ *	94
South -------------	92	8	4	2	2	60
West --------------	93	7	4	--	3	58
Previous experience:						
Have had food facilities -------	100	--	--	--	--	76
Have not had food facilities -------	93	7	3	2	2	255

1/ Asterisk indicates less than 0.5 percent.

Table 7.--"Of your plant's total employees during January 1956, approximately how many are men? How many women?"

Plant characteristics	Proportion of plants with specified percentages of male employees --					Plants
	25 or fewer	26 to 50	51 to 75	76 to 90	91 to 100	
	Percent	Percent	Percent	Percent	Percent	Number
Plants without food facilities:						
United States total ----------	7	14	11	26	42	77
Plants with food facilities:						
United States total ----------	10	14	27	25	24	391
Employee size group:						
1,000 or more ------------	3	7	26	35	29	184
500 to 999 ---------------	12	20	29	13	26	113
250 to 499 ---------------	15	13	26	28	18	94
Region:						
Northeast ----------------	15	21	28	19	17	112
North Central ------------	2	8	23	38	29	149
South --------------------	17	16	32	13	22	81
West ---------------------	12	5	19	28	36	49

Table 8.--"Of the plant's total employees ... about what proportion are primarily engaged in heavy physical activity? Moderate physical activity? Light physical activity?" 1/

Plant characteristics	Type of physical activity					Plants
	Light	Light to moderate	Moderate	Moderate to heavy	Heavy	
	Percent	Percent	Percent	Percent	Percent	Number
Plants without food facilities:						
United States total ---------	21	24	28	17	10	77
Plants with food facilities:						
United States total ---------	20	25	33	13	9	391
Employee size group:						
1,000 or more -----------	17	21	38	15	9	184
500 to 999 --------------	19	31	33	10	7	113
250 to 499 --------------	23	24	30	14	9	94
Region:						
Northeast ---------------	22	30	32	13	3	112
North Central -----------	14	28	32	15	11	149
South -------------------	24	15	41	10	10	81
West --------------------	25	20	25	17	13	49

1/ The proportions mentioned by plant executives in answer to this question were weighted to derive a score for the plant. The percentages shown indicate the proportions of plants in which the work appeared to be generally light, light to moderate, etc.

Table 9.--"How many days per week is this plant usually operated?"

Plant characteristics	5 days	5-1/2 days	6 or 6-1/2 days	7 days	Plants
	Percent	Percent	Percent	Percent	Number
Plants without food facilities:					
United States total ------------	69	3	15	13	77
Plants with food facilities:					
United States total ------------	69	4	12	15	391
Employee size group:					
1,000 or more --------------	62	4	14	20	184
500 to 999 -----------------	69	5	9	17	113
250 to 499 -----------------	74	4	14	8	94
Region:					
Northeast ------------------	67	5	10	18	112
North Central --------------	76	4	12	8	149
South ----------------------	55	4	18	23	81
West -----------------------	76	3	4	17	49

Table 10.--"How many shifts per day will your plant operate in January (1956)?"

Plant characteristics	One shift	Two shifts	Three shifts	Plants
	Percent	Percent	Percent	Number
Plants without food facilities:				
United States total -----------	35	32	33	77
Plants with food facilities:				
United States total -----------	24	33	43	391
Employee size group:				
1,000 or more -------------	12	29	59	184
500 to 999 ----------------	23	32	45	113
250 to 499 ----------------	38	36	26	94
Region:				
Northeast -----------------	24	32	44	112
North Central -------------	22	40	38	149
South ---------------------	28	17	55	81
West ----------------------	25	40	35	49

Table 11.--"How much time is allowed to non-executive employees for their lunch period?"

Plant characteristics	Less than 30 minutes	30 minutes	45 minutes	60 minutes	Other 1/	Plants
	Percent	Percent	Percent	Percent	Percent	Number
Plants without food facilities:						
United States total ---------	12	53	5	22	8	77
Plants with food facilities:						
United States total ---------	10	70	8	7	5	391
Employee size group:						
1,000 or more -----------	13	70	7	4	6	184
500 to 999 --------------	7	74	8	6	5	113
250 to 499 --------------	10	65	8	12	5	94
Region:						
Northeast ---------------	15	61	11	10	3	112
North Central -----------	7	81	6	5	1	149
South -------------------	9	62	6	8	15	81
West --------------------	5	75	14	2	4	49

1/ Includes plants where varying amounts of time are allowed, plants which do not specify a time period, and plants which do not have a formal lunch period.

Table 12.--"On the average, does you plant's total payroll (number of employees) remain at the same level throughout the year, or do you have seasonal peaks where it is substantially (say 20 percent or more) higher or lower than the January 1956 total?"

Plant characteristics	Payroll is fairly uniform	Payroll has seasonal peaks	Plants
	Percent	Percent	Number
Plants without food facilities:			
United States total --------------	77	23	77
Plants with food facilities:			
United States total --------------	85	15	391
Employee size group:			
1,000 or more ----------------	86	14	184
500 to 999 -------------------	81	19	113
250 to 499 -------------------	89	11	94
Region:			
Northeast --------------------	90	10	112
North Central ----------------	81	19	149
South ------------------------	89	11	81
West -------------------------	76	24	49

Table 13.--"In what year did your company begin manufacturing operations at this plant?"

Year began operations	Plants with food facilities				Plants without food facilities
	Total	1,000 or more employees	500 to 999 employees	250 to 499 employees	
	Percent	Percent	Percent	Percent	Percent
1952 or later -------	5	2	7	4	2
1949 to 1951 --------	11	4	11	17	9
1946 1948 -----------	8	8	8	7	9
1941 to 1945 --------	9	6	11	9	5
1936 to 1940 --------	8	8	8	9	13
1931 to 1935 --------	3	3	4	3	1
1926 to 1930 --------	8	9	9	7	7
1921 to 1925 --------	8	12	4	9	5
1911 to 1920 --------	13	15	14	10	13
1901 to 1910 --------	11	13	12	10	14
1900 or earlier -----	15	20	11	14	20
Not ascertained -----	1	[1]*	1	1	2
Median year began operations ---------	1927	1921	1930	1930	1922
Number of plants -	391	184	113	94	77

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[1] Asterisk indicates less than 0.5 percent.

Table 14.--Plants with food facilities: "In approximately what year were regular feeding facilities for employees established in this plant?"

Plant characteristics	Established food facilities in:							Plants
	1952 or later	1949-1951	1946-1948	1941-1945	1936-1940	1921-1935	1920 or earlier	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Number
United States total	13	14	12	19	14	19	9	391
Employee size group:								
1,000 or more	4	6	10	20	14	30	16	184
500 to 999	14	14	15	21	16	15	5	113
250 to 499	20	24	10	17	14	11	4	94
Year began operations:								
1952 or later	--	--	--	--	--	--	--	17
1949 to 1951	17	83	--	--	--	--	--	44
1946 to 1948	9	11	80	--	--	--	--	32
1941 to 1945	5	13	14	68	--	--	--	32
1936 to 1940	--	5	10	34	51	--	--	31
1921 to 1935	14	2	3	17	19	45	--	76
1920 or earlier	6	9	8	16	15	24	22	159

Table 15.--"Are there any public eating places close enough for your employees to get a meal during their allotted lunch period?" (If "yes"): "About what proportion of your plant's peak employee meal demand would you estimate can be taken care of by these public eating places?"

Plant characteristics	Availability of eating places		Percentage of peak demand which can be accommodated					Plants
	Not available	Available	24 or less	25-39	40-59	60-99	100	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Number
Plants without food facilities:								
United States total ---------	16	84	11	3	12	3	55	77
Plants with food facilities:								
United States total --------	35	65	30	10	6	2	17	391
Employee size group:								
1,000 or more ----------	31	69	40	12	6	1	10	184
500 to 999 -------------	34	66	31	15	5	1	14	113
250 to 499 -------------	41	59	18	6	7	3	25	94
Region:								
Northeast --------------	25	75	34	11	8	--	22	112
North Central ----------	36	64	30	10	6	3	15	149
South ------------------	44	56	22	14	3	4	13	81
West -------------------	48	52	28	4	12	--	8	49

Table 16.--Plants without food facilities: "Where do your employees get their lunch?" (If more than one mentioned): "Where do the majority of your employees get their lunch?"

Responses	Some employees get lunch in this way	Majority of employees get lunch in this way
	Percent 1/	Percent
Bring their lunches to work ---	99	73
Go to nearby public eating places ----------------------	73	14
Go home for lunch ------------	48	10
Use vending machines ---------	23	2
Have lunch sent in -----------	13	--
Miscellaneous ----------------	6	1
Number of plants ----------	77	77

1/ Percentages add to more than 100 because of multiple answers.

Table 17.--Plants with food facilities: "What were the reasons for setting up these feeding facilities? In general, what would you say are the advantages to management of having regular food services for your employees?" 1/

Responses	United States total	Employee size group			Region			
		1,000 or more	500-999	250-499	North-east	North Central	South	West
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Improve employee morale, increase benefits	78	72	81	82	81	74	83	75
Reduce lunch hour, save production time --	56	63	52	54	61	55	51	64
Insufficient public eating places --------	46	48	47	43	44	45	45	63
Improve employee - management relations --	37	34	36	41	33	38	42	29
Provide more healthful meals for employees ----------------------------------	29	30	37	21	34	28	30	15
Provide less expensive meals -------------	19	22	21	13	21	14	22	24
Improve production -----------------------	19	20	18	18	21	16	18	29
Help in recruiting personnel -------------	12	11	11	13	8	14	10	19
Cut down sickness or lost time -----------	6	8	7	5	7	6	4	21
Company policy ---------------------------	5	7	5	3	8	3	5	3
Supplement other eating arrangements -----	4	4	4	6	4	3	5	12
Allow socializing among employees --------	4	4	3	6	5	2	6	10
Improve plant sanitation -----------------	2	1	1	4	--	4	2	--
Facilities established by former management ------------------------------------	2	1	4	--	2	2	1	4
Legal requirement ------------------------	1	1	2	2	3	--	--	9
Miscellaneous ----------------------------	1	2	2	--	--	2	--	1
Number of plants -----------------	391	184	113	94	112	149	81	49

1/ Percentages add to more than 100 because of multiple answers.

Table 18.--Plants with food facilities: "What are the drawbacks - disadvantages to management - of having these facilities?" [1]

Responses	United States total	Employee size group			Region			
		1,000 or more	500-999	250-499	North-east	North Central	South	West
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
No disadvantages named ------	28	28	27	31	43	20	27	18
Some disadvantages ----------	72	72	73	69	57	80	73	82
High cost -------------------	45	46	52	36	35	45	52	64
Takes much management time and attention --------------	19	20	18	18	18	19	20	19
Some employee complaints ----	17	17	17	16	14	19	15	24
Lost production time, excess time spent -----------------	16	9	17	20	15	19	12	12
Facilities take up too much space ---------------------	13	18	14	8	11	14	13	18
Maintenance, sanitation and housekeeping problems ------	6	5	7	7	3	8	7	6
Difficult meal scheduling operation -----------------	2	2	1	3	1	2	4	1
Miscellaneous ---------------	1	1	--	1	1	1	2	--
Number of plants -----	391	184	113	94	112	149	81	49

[1] Percentages add to more than the proportion citing disadvantages because of multiple answers.

Table 19.--Plants with food facilities: "Specifically, would you say these (food) facilities have a good effect, a bad effect, or no effect at all on employee morale? on employee productivity? on employee recruiting? on employee health? on labor-management relations?"

Responses	United States total	Employee size group			Region			
		1,000 or more	500-999	250-499	North-east	North Central	South	West
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Employee morale:								
Good effect --------------------	92	91	93	91	92	90	94	89
No effect ----------------------	8	8	7	9	8	9	6	11
Bad effect ---------------------	1/*	1	--	--	--	1	--	--
Employee productivity:								
Good effect --------------------	63	68	61	61	58	64	66	73
No effect ----------------------	36	31	38	38	40	36	34	24
Bad effect ---------------------	1	1	1	1	2	--	--	3
Employee recruiting:								
Good effect --------------------	48	49	48	48	46	51	47	43
No effect ----------------------	52	50	52	52	54	48	53	57
Bad effect ---------------------	*	1	--	--	--	1	--	--
Employee health:								
Good effect --------------------	70	75	74	60	65	69	77	71
No effect ----------------------	30	24	26	40	35	31	23	29
Bad effect ---------------------	*	1	--	--	*	--	--	--
Labor-management relations:								
Good effect --------------------	77	77	76	79	75	77	80	82
No effect ----------------------	21	23	23	18	25	21	19	15
Bad effect ---------------------	2	*	1	3	--	2	1	3
Number of plants -----------	391	184	113	94	112	149	81	49

1/ Asterisk indicates less than 0.5 percent.

Table 20.--Plants with food facilities: "Considering your plant's experience with these (food) facilities, if you had the decision to make now, would you set up employee feeding facilities?" (If "no"): "Why not?" 1/

Responses	United States total	Employee size group			Region			
		1,000 or more	500-999	250-499	North-east	North Central	South	West
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Yes--would set up facilities --	94	95	93	95	95	94	94	94
No--would not set up facilities	6	5	7	5	5	6	6	6
High cost --------------------	3	2	5	1	2	1	6	2
Employee complaints -----------	1	1	2	1	1	1	3	--
Lost production time ----------	1	1	--	2	2	1	--	--
Public facilities are now adequate -----------------------	1	1	1	1	2	--	2	--
Takes too much management time and attention ---------------	1	1	--	2	--	1	--	4
Not ascertained --------------	1	2	2	--	1	2	--	--
Number of plants ---------	391	184	113	94	112	149	81	49

1/ Percentages may add to more than the proportion that would not set up facilities because of multiple answers.

Table 21.--Plants with food facilities: "Is there anything you would do differently now than was done when your facilities were set up?" (If "yes"): "What would this be?" 1/

Responses	United States total	Employee size group			Region				Form of operation	
		1,000 or more	500-999	250-499	North-east	North Central	South	West	Company op-erated	Con-tractor operated
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
No--nothing would be done differently -	56	57	55	56	49	61	57	46	56	63
Yes--something would be done differently	44	43	45	44	51	39	43	54	44	37
Physical changes in facilities:										
Relocate or change layout -----------	21	24	22	19	24	24	16	13	21	24
Expand, use more space --------------	15	12	19	12	17	13	15	8	13	17
Use less space ----------------------	1	1	1	--	2	--	--	--	1	2/*
Operating changes in facilities:										
Offer better, more varied meals -----	5	3	4	6	5	2	8	4	1	8
Use more vending machines -----------	3	4	3	3	4	2	5	4	1	5
Change hours facilities open --------	2	2	1	1	3	1	--	2	2	1
Raise price of meals ----------------	1	1	1	1	2	--	--	3	3	*
Reduce price of meals ---------------	1	--	1	1	2	--	--	--	--	1
Changes in facility management:										
Would have used contractor operation (from beginning) ------------------	5	7		4	4	5	5	6	8	4
Would have used company operation (from beginning) ------------------	1	--	2	2	2	--	2	5	2	1
Would have used third type of management -----------------------------	1	1	--	2	--	2	--	3	1	1
Would improve present form of operation -----------------------------	3	1	3	4	4	2	3	5	1	4
Miscellaneous ------------------------	1	2	1	1	1	2	--	3	1	1
Number of plants ---------------	391	184	113	94	112	149	81	49	128	266

1/ Percentages add to more than the proportion which would do something differently because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.

Table 22.--Plants with food facilities: "As far as you know, do you expect that in the next two or three years, your plant's feeding capacity will remain at about present levels? be expanded? be reduced? be discontinued? Why do you plan to (expand) (reduce) (discontinue) your feeding facilities?"

Responses	United States total	Employee size group			Region			
		1,000 or more	500-999	250-499	North-east	North Central	South	West
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Capacity will remain at about present levels	76	74	77	76	72	75	82	73
Capacity will be reduced	1	1/*	3	1	3	1	--	1
Capacity will be expanded	23	26	20	23	25	24	18	26
Entire plant is expanding	21	24	18	21	23	21	18	23
Will have more complete food service	1	1	--	2	--	1	--	3
Expect greater employee participation	1	1	2	--	--	2	--	--
Not ascertained	*	--	1	1	2	--	--	3
Number of plants	391	184	113	94	112	149	81	49

1/ Asterisk indicates less than 0.5 percent.

Table 23.--Plants with food facilities: "What are the good points of the arrangement (i.e., form of operation of food facility) you use compared with the other arrangement? What do you particularly like about having your food service operated by (your own company?) (an outside contractor?)" 1/

Responses	Plants with: Company operated food facilities	Plants with: Contractor operated food facilities
	Percent	Percent
Better control over the facilities	65	5
Food and menu better	48	11
Better control over costs	24	4
Lower prices to employees	22	3
Company motivated by employee interests	20	--
Ability to handle emergencies or guests	2	--
Relieves plant management of details	--	78
More experienced	7	39
Lower costs to operator	10	36
Use truck caterer because of limited space	--	4
Not ascertained	1	1
Number of plants	128	266

1/ Percentages add to more than 100 because of multiple answers.

Table 24.--Plants with food facilities: "What are the disadvantages of (operating your own food facilities?) (having your food facilities operated by an outside contractor?). Is there anything you don't like about it, or prefer about other arrangements?" 1/

Responses	Plants with: Company operated food facilities	Plants with: Contractor operated food facilities
	Percent	Percent
No disadvantages mentioned	30	59
Some disadvantages	70	41
Many administrative details	43	8
Expensive to operate	44	6
Less control over food quality	1	25
Less control over costs	2	5
High cost to employees	--	4
Poor service	1	3
Miscellaneous	2	3
Number of plants	128	266

1/ Percentages associated with disadvantages add to more than proportion mentioning disadvantages because of multiple answers.

Table 25.--Plants with food facilities: "Has this plant ever used another arrangement for in-plant feeding operations?" (If "yes"): "Why was it changed?" 1/

Responses	Plants with: Company operated food facilities	Plants with: Contractor operated food facilities
	Percent	Percent
No--never used other arrangement	78	69
Yes--have used other arrangement	22	31
Reasons for change:		
Former arrangement too costly	6	17
Too burdensome on management	--	14
Served poor food	7	3
Gave poor service	4	3
Caused excessive employee complaints	1	3
Charged high prices to employees	6	1
Was managed inefficiently	2	1
Number of plants	128	266

1/ Reasons for change add to more than the proportion who had used other arrangements because of multiple answers.

Table 26.--Plants with contractor operated feeding facilities: "What arrangements do you have with the individual or firm that operates your feeding facilities?"

Plant characteristics	Contractor operates: For profit like an independent business	On guaranteed minimum profit	On cost plus fixed fee	Under a subsidy	Other arrangements	Not ascertained	Plants
	Percent	Percent	Percent	Percent	Percent	Percent	Number
United States total ------	69	15	9	4	1	2	266
Employee size group:							
1,000 or more ----------	61	19	14	1	3	2	127
500 to 999 -------------	64	15	10	9	--	2	75
250 to 499 -------------	82	12	2	1	--	3	64
Region:							
Northeast --------------	74	10	5	5	2	4	77
North Central ----------	71	16	9	1	1	2	104
South ------------------	63	18	12	6	--	1	53
West -------------------	--	--	--	--	--	--	1/32

1/ Cases too few for analysis.

Table 27.--Plants with contractor operated feeding facilities: "Is there any direct subsidy or money contribution from your company to the employee feeding operation?"

Plant characteristics	Direct subsidy or money contribution is made	No direct subsidy or money contribution is made	Not ascertained	Plants
	Percent	Percent	Percent	Number
United States total ------	21	77	2	266
Employee size group:				
1,000 or more ----------	23	77	1/*	127
500 to 999 -------------	26	72	2	75
250 to 499 -------------	14	83	3	64
Region:				
Northeast --------------	19	77	4	77
North Central ----------	20	79	1	104
South ------------------	19	81	--	53
West -------------------	--	--	--	2/ 32

1/ Asterisk indicates less than 0.5 percent.
2/ Cases too few for analysis.

Table 28.--Plants with contractor-operated feeding facilities: "Is this contractor charged rent for the space occupied by the feeding facilities?" "Are they charged for the utilities they use?" "Are they charged specifically by your company for any other expenses?" (If "yes") "Which other expenses are they charged with?"

Plant characteristics	Rent	Utilities	Maintenance, repairs	Franchise for privilege of operating	Other expenses	No expenses charges	Plants
	Percent	Percent	Percent	Percent	Percent	Percent	Number
United States total -----	13	8	3	2	2	78	266
Employee size group:							
1,000 or more ---------	12	9	4	2	5	76	127
500 to 999 ------------	12	6	2	3	--	81	75
250 to 499 ------------	17	9	2	2/*	2	78	64
Region:							
Northeast -------------	10	5	--	1	3	84	77
North Central ---------	7	5	3	--	3	86	104
South -----------------	27	16	5	5	--	60	53
West ------------------	--	--	--	--	--	--	3/32
Financial arrangements:							
Contractor operates for profit --------------	18	10	4	2	2	74	177
Other arrangements ----	2	3	1	*	1	94	84

1/ Percentages add to more than 100 because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.
3/ Cases too few for analysis.

Table 29.--Plants with vending machines: "At the present time what beverages are available in vending machines?" (If milk not mentioned) "Is milk available? What foods are available?" 1/

Responses	United States total	Plants with food facilities					Plants without food facilities
		Employee size group			Form of operation		
		1,000 or more	500-999	250-499	Company operated	Contract operated	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Soft drinks ---------------	90	90	89	91	92	90	94
Candy, peanuts, or gum -----	81	86	76	79	84	80	80
Coffee --------------------	39	50	27	37	39	37	55
Milk ----------------------	25	33	23	20	28	23	43
Cookies -------------------	19	19	23	15	17	19	33
Ice cream -----------------	18	20	10	20	16	18	29
Hot chocolate -------------	8	10	4	7	5	9	11
Fruit juices --------------	5	8	4	4	3	6	14
Sandwiches ----------------	2	7	1	--	3	2	12
Pastry, pie, cake ----------	2	2	--	3	4	1	11
Soup ----------------------	2	2	2	1	2	2	9
Fruit ---------------------	1	2	1	--	2	1	5
Miscellaneous -------------	1	1	1	--	--	1	1
Number of plants ------	353	164	100	89	117	239	66

1/ Percentages add to more than 100 because of multiple answers.

Table 30.--Plants with vending machines: "Are you planning to add or decrease in number or capacity any of the kinds of vending machines you now have? If so, which ones? Are you planning to add any new kinds of vending machines?" (If "yes"): "What kinds?" 1/

Responses	Plants with food facilities								Plants without food facilities
	United States total	Employee size group			Region				
		1,000 or more	500-999	250-499	Northeast	North Central	South	West	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Plan no changes	79	75	82	81	80	79	81	72	79
Plan decreases	2	1	3	1	3	2	1	--	4
Plan to add new types	13	19	13	9	15	14	7	22	18
Plan to increase present types	10	12	9	10	10	7	15	16	5
Types to be added or increased:									
Milk	8	12	9	4	6	9	10	7	8
Coffee	8	13	9	3	10	8	8	9	8
Soft drinks	6	8	5	6	4	4	11	10	--
Candy, peanuts, or gum	5	6	4	1	3	3	4	11	--
Sandwiches	3	8	1	1	5	4	2	1	2
Ice cream	3	4	1	4	--	6	3	11	--
Soup	2	5	2/*	2	1	4	1	5	3
Fruit juices	1	2	1	--	--	2	1	--	2
Pastry, pie, cake	1	1	1	--	2	--	--	--	2
Fruit	1	2	--	--	1	--	1	2	--
Cookies	1	1	1	2	--	2	4	2	--
Hot chocolate	1	3	1	--	1	2	1	1	2
Miscellaneous	2	4	3	--	2	3	1	1	4
Number of plants	353	164	100	89	104	135	71	43	66

1/ Percentages add to more than 100 or to more than the proportion planning changes because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.

Table 31.--"In general, what would you say are the good points of having vending machines in a plant--what advantages do you see in them?" 1/

Responses	Plants with food facilities						Plants without food facilities
	United States total	Employee size group			Vending machines		
		1,000 or more	500-999	250-499	Now have	Do not have	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
No advantages mentioned ------	12	11	14	8	6	67	12
Some advantages --------------	88	89	86	92	94	33	88
Improves employee morale ---	55	51	50	64	59	--	67
Keeps employees near work (saves production time) ---	36	41	32	34	38	--	29
Supplements regular or outside feeding facilities ---	19	18	20	20	20	--	2
Provides employee pick-up --	9	10	8	8	10	--	8
Lower costs than other feeding facilities ------------	8	9	9	5	9	--	2
Produces revenue -----------	5	5	8	1	5	--	6
Outside operators have full responsibility -------------	4	4	4	3	4	--	4
Saves space ----------------	1	1	1	3	2	--	--
More sanitary foods and better housekeeping ----------	1	1	2	1	2	--	3
Miscellaneous --------------	1	2	1	--	1	--	4
Number of plants -----	391	184	113	94	353	2/38	77

1/ Percentages add to more than proportions mentioning advantages because of multiple answers.
2/ Cases too few for analysis.

Table 32.--"What would you say are the drawbacks or disadvantages of having vending machines?" 1/

Responses	Plants with food facilities						Plants without food facilities
	United States total	Employee size group			Vending machines		
		1,000 or more	500-999	250-499	Now have	Do not have	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
No disadvantages mentioned --------	19	21	20	18	19	13	20
Some disadvantages ----------------	81	79	80	82	81	87	80
Housekeeping problems -----------	44	40	45	48	43	--	46
Too much time lost --------------	32	36	31	28	30	--	36
Unreliable servicing of machines	25	22	28	25	26	--	14
Vandalism, pilferage ------------	9	7	12	8	9	--	2
Takes too much space ------------	7	8	7	7	7	--	10
Cost of operation exceeds revenue -----------------------	2	1	2	4	--	--	2
Competes with other (outside) feeding facilities ------------	2	3	1	3	2	--	1
Employee complaints ------------	2	4	1	2	2	--	2/*
Limited variety of food ---------	1	2	2	--	1	--	2
Poor quality of food ------------	1	2	--	--	1	--	2
Rising cost of product in machine -----------------------	1	1	--	1	1	--	--
Miscellansous -------------------	*	--	--	1	*	--	2
Number of plants -------	391	184	113	94	353	3/38	77

1/ Percentages may add to more than the proportion mentioning disadvantages because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.
3/ Cases too few for analysis.

Table 33.--"What types of feeding facilities are operated for employees of this plant - do you have cafeterias, mobile food carts serving hot meals, restaurants with table service, or any other facilities serving hot food?" 1/

Plant characteristics	Cafeterias	Mobile food carts	Canteens, candy stands, lunch counters	Restaurants with table service	Plants
	Percent	Percent	Percent	Percent	Number
United States total-	78	20	16	8	378
Employee size group:					
1,000 or more ----	90	24	16	11	177
500 to 999 -------	78	14	11	7	110
250 to 499 -------	65	21	21	7	91
Region:					
Northeast --------	81	20	14	9	108
North Central ----	77	22	18	8	141
South ------------	72	15	17	8	81
West -------------	94	23	7	6	48
Form of operation:					
Company operated -	92	7	5	9	126
Contractor operated ------------	71	27	21	8	252

1/ Percentages add to more than 100 because of multiple answers.

Table 34.--"In which kind of facility do you feed the largest number of employees?"

Plant characteristics	Cafeterias	Mobile food carts	Canteens, candy stands, lunch counters	Restaurants with table service	Plants
	Percent	Percent	Percent	Percent	Number
United States total-	73	11	12	4	378
Employee size group:					
1,000 or more ----	82	9	8	1	177
500 to 999 -------	75	10	9	6	110
250 to 499 -------	62	15	18	5	91
Region:					
Northeast --------	75	14	8	3	108
North Central ----	71	11	15	3	141
South ------------	70	10	14	6	81
West -------------	92	5	1	2	48
Form of operation:					
Company operated -	89	1	4	6	126
Contractor operated ------------	65	17	15	3	252

Table 35.--"Which facilities are open for coffee breaks?" 1/

Plant characteristics	No coffee breaks allowed	No facilities open for coffee breaks	Some facilities open for coffee breaks: Total	Cafeterias	Mobile food carts	Canteens candy stands, lunch counters	Restaurants with table service	Plants
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Number
United States total ---	13	15	72	53	13	12	3	378
Employee size group:								
1,000 or more -------	21	14	65	54	11	12	1	177
500 to 999 ----------	7	17	76	56	11	8	5	110
250 to 499 ----------	13	11	76	49	17	15	4	91
Region:								
Northeast -----------	12	9	79	59	16	10	2	108
North Central -------	14	24	62	45	11	13	2	141
South ---------------	14	7	79	51	12	14	6	81
West ----------------	7	15	78	76	16	5	2	48

1/ Percentages may add to more than the proportion having facilities open for coffee breaks because of multiple answers.

Table 36.--Plants with food facilities: "Which types of meals do you serve regularly each day? What are the serving hours?"

Responses	United States total	Employee size group: 1,000 or more	500-999	250-499	Region: North-east	North Central	South	West	Form of operation: Company operated	Contractor operated
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Types of meals served:										
Noon meals (10 A.M. - 2 P.M.) ---------	98	98	99	96	99	98	97	97	98	97
Morning meals (6 A.M. - 10 A.M.) ------	46	59	47	33	42	42	58	48	37	51
Evening meals (6 P.M. - 10 P.M.) ------	40	54	44	21	29	40	51	47	32	44
Afternoon meals (2 P.M. - 6 P.M.) -----	17	22	19	9	13	14	26	14	15	18
Early morning meals (2 A.M. - 6 A.M.) -	14	22	14	7	8	13	26	13	10	17
Midnight meals (10 P.M. - 2 A.M.) -----	12	15	12	7	10	6	23	11	9	13
Number of meal periods served:										
One period ---------------------------	37	22	32	58	50	37	23	32	43	34
Two periods --------------------------	28	22	34	27	20	33	29	29	25	29
Three or more periods ----------------	35	56	34	15	30	30	48	39	32	37
Number of plants ---------------	378	177	110	91	108	141	81	48	126	252

Table 37.--"Is milk available to employees at all these (meal) times?"

Plant characteristics	Milk available all times	Not always available	Plants
	Percent	Percent	Number
United States total -------------	97	3	378
Employee size group:			
1,000 or more -----------------	98	2	177
500 to 999 --------------------	96	4	110
250 to 499 --------------------	97	3	91
Region:			
Northeast ---------------------	95	5	108
North Central -----------------	98	2	141
South -------------------------	98	2	81
West --------------------------	99	1	48
Form of operation:			
Company operated --------------	95	5	126
Contractor operated -----------	98	2	252

Table 38.--Plants allowing coffee breaks: "Is milk available to employees during coffee breaks?"

Plant characteristics	Milk available	Milk not available	Not ascertained	Plants
	Percent	Percent	Percent	Number
United States total -------	90	7	3	331
Employee size group:				
1,000 or more -----------	92	5	3	149
500 to 999 --------------	91	6	3	103
250 to 499 --------------	90	7	3	79
Region:				
Northeast ---------------	96	3	1	95
North Central -----------	85	11	4	121
South -------------------	93	5	2	70
West --------------------	80	17	3	45
Form of operation:				
Company operated --------	90	8	2	112
Contractor operated -----	90	7	3	219

Table 39.--"What types of menus do you usually offer in your (facility serving the largest number of employees)?"

Plant characteristics	Only budget meals or **special plates**	Only a la carte foods	Both budget and a la carte	All foods served free	Plants
	Percent	Percent	Percent	Percent	Number
United States total	10	38	51	1	378
Employee size group:					
1,000 or more	5	35	59	1	177
500 to 999	13	32	55	--	110
250 to 499	11	48	40	1	91
Region:					
Northeast	8	41	50	1	108
North Central	8	32	59	1	141
South	10	51	39	--	81
West	25	20	55	--	48
Facility serving largest number of employees:					
Cafeterias	10	33	56	1	285
Mobile food carts	6	62	32	--	41
Restaurants with table service	--	--	--	--	[1]11
Canteens, candy stands, lunch counters	2	61	37	--	41
Form of operation:					
Company operated	12	37	49	2	126
Contractor operated	8	39	53	--	252

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[1] Cases too few for analysis.

Table 40.--"Are any foods provided to employees without charge, regardless of whether other foods are bought?" 1/

Responses	United States total	Employee size group			Region			
		1,000 or more	500-999	250-499	North-east	North Central	South	West
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
No--no foods provided free ---	93	91	92	95	88	94	99	83
Yes--some foods provided free	7	9	8	5	12	6	1	17
All foods ----------------	1	1	--	1	1	1	--	--
Coffee -------------------	3	4	2	3	6	3	--	7
Milk ---------------------	1	1	1	1	3	--	--	--
Other beverages -----------	1	--	3	1	5	--	--	--
Free meals for over-time workers -----------------	2	4	1	--	1	2	--	10
Miscellaneous -------------	2	2	3	--	3	1	1	--
Number of plants -------	378	177	110	91	108	141	81	48

1/ Percentages may add to more than the proportion providing free foods because of multiple answers.

Table 41.--"About what percentage of your plant's employees would you estimate eat meals in your food services on an average day?"

Percentage estimated	United States total	Employee size group			Region				Form of operation	
		1,000 or more	500-999	250-499	North-east	North Central	South	West	Company operated	Contractor operated
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
19 or less ---------	14	13	15	14	22	12	8	12	8	17
20 to 24 -----------	5	5	3	7	7	5	2	5	7	4
25 to 32 -----------	11	11	8	15	11	12	8	20	4	14
33 to 39 -----------	7	7	7	5	1	10	6	8	3	8
40 to 59 -----------	21	20	20	23	20	18	28	25	27	19
60 to 74 -----------	18	18	22	14	15	18	22	12	20	17
75 to 89 -----------	15	17	14	13	14	15	15	12	18	13
90 or more ---------	7	7	8	7	7	6	10	6	13	4
Not ascertained ----	2	2	3	2	3	4	1	--	--	4
Median percentage --	52	53	55	47	48	50	58	44	62	45
Number of plants -	378	177	110	91	108	141	81	48	126	252

Table 42.--"Do you operate your own butcher shop on the premises?" 1/

Plant characteristics	Operate own butcher shop	Do not operate own butcher shop	Not ascertained	Plants
	Percent	Percent	Percent	Number
United States total ------	21	77	2	378
Employee size group:				
1,000 or more ----------	33	66	1	177
500 to 999 -------------	18	82	--	110
250 to 499 -------------	12	85	3	91
Region:				
Northeast --------------	17	81	2	108
North Central ----------	17	82	1	141
South ------------------	31	68	1	81
West -------------------	32	64	4	48
Form of operation:				
Company operated -------	25	74	1	126
Contractor operated ----	19	79	2	252

1/ "Butcher shop" is defined as having a butcher's block or facilities to cut up wholesale cuts of meat.

Table 43.--"Do you have your own ice cream making facilities on the premises?"

Plant characteristics	Have ice cream making facilities	Do not have ice cream making facilities	Not ascertained	Plants
	Percent	Percent	Percent	Number
United States total -------	2	97	1	378
Employee size group:				
1,000 or more -----------	4	96	--	177
500 to 999 --------------	--	99	1	110
250 to 499 --------------	1	95	4	91
Region:				
Northeast ---------------	4	96	--	108
North Central -----------	1	97	2	141
South -------------------	1	97	2	81
West --------------------	3	97	--	48
Form of operation:				
Company operated --------	2	97	1	126
Contractor operated -----	2	97	1	252

Table 44.--"What kinds of baked goods do you produce regularly in your own facilities on the premises?" 1/

Responses	United States total	Employee size group			Region				Form of operation	
		1,000 or more	500-999	250-499	North-east	North Central	South	West	Company operated	Contractor operated
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Produce no baked goods	58	42	56	73	73	52	47	47	49	60
Produce some baked goods	42	58	44	27	27	48	53	53	51	40
Cakes	32	46	29	21	21	37	35	47	40	28
Pies	30	41	29	19	20	30	42	31	34	28
Quick breads 2/	22	31	26	10	10	21	40	14	21	22
Yeast rolls	17	30	14	7	10	20	22	20	17	18
Cookies	16	25	13	8	12	17	16	22	17	15
Yeast breads	7	12	5	5	6	3	14	10	6	8
Doughnuts	4	8	2	2	4	6	3	1	2	5
Miscellaneous	6	8	7	2	3	8	3	11	6	5
Number of plants	378	177	110	91	108	141	81	48	126	252

1/ Percentages for types of baked goods produced add to more than the proportion who bake because of multiple answers.
2/ Includes muffins, baking power biscuits, cornbread, and similar items.

Table 45.--"What is your approximate total cubic footage of zero-freezer space used for foods other than ice cream?"

Responses	United States total	Employee size group			Region				Form of operation	
		1,000 or more	500-999	250-499	North-east	North Central	South	West	Company operated	Contractor operated
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
None	24	15	28	33	35	22	23	19	21	26
Have zero-freezer space for food	76	85	72	67	65	78	77	81	79	74
1 to 10 cubic feet	25	16	26	35	24	21	32	26	20	28
11 to 25 cubic feet	19	22	22	12	15	23	15	26	21	18
26 to 50 cubic feet	10	15	10	4	11	12	6	4	9	10
51 to 100 cubic feet	5	5	4	6	3	5	8	4	8	5
101 or more cubic feet	13	21	6	9	8	15	10	19	16	10
Not ascertained	4	6	4	1	4	2	6	2	5	3
Median cubic feet: Plants with zero-freezer space	21	37	18	10	19	22	17	19	22	19
Number of plants	378	177	110	91	108	141	81	48	126	252

Table 46.--Plants which have zero-freezer space for foods: "During the next year or two, are you planning to increase your zero-freezer space, decrease it, or keep it at current levels?"

Plant characteristics	Plan to increase	Plan no changes	Not ascertained	Plants
	Percent	Percent	Percent	Number
United States total ------------------	18	71	11	292
Employee size group:				
1,000 or more ---------------------	18	68	14	150
500 to 999 ------------------------	10	82	8	80
250 to 499 ------------------------	28	61	11	62
Region:				
Northeast -------------------------	27	67	6	74
North Central ---------------------	15	70	15	112
South -----------------------------	17	72	11	65
West ------------------------------	13	79	8	41
Form of operation:				
Company operated ------------------	16	72	12	100
Contractor operated ---------------	19	70	11	192

Table 47.--Plants with food facilities: Summary of sources of supply for selected commodities (378 plants)

Buying practices	Meat	Poultry	Fish and sea food	Fresh fruits and vegetables	Canned fruits and vegetables	Frozen fruits and vegetables	Fluid milk and cream	Fresh eggs	Flour	Fats and oils 1/
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Purchase the commodity -------	96	88	95	95	93	67	99	95	85	90
From one type of supplier only ---------------------	56	79	85	88	80	61	97	91	83	85
From more than one type ----	39	7	7	6	11	1	1	3	2/*	4
Not ascertained ------------	1	2	3	1	2	5	1	1	2	1
Make own or order from commissary --------------------	4	4	*	1	3	1	1	3	4	6
Do not use ------------------	*	8	5	4	4	32	*	2	11	4

1/ Excludes butter.
2/ Asterisk indicates less than 0.5 percent.

Table 48.--Plants that purchase meat: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you buy meat?" 1/

Meat suppliers	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Hotel and restaurant supply house	43	50	42	39
Packing plant ------------------	41	44	42	36
Packer-owned branch house ------	35	39	36	28
Retail store -------------------	18	7	20	27
Wholesaler or jobber -----------	5	5	6	4
Not ascertained ----------------	1	--	1	2
Number of plants --------	361	166	107	88

1/ Percentages add to more than 100 because of multiple answers.

Table 49.--Plants that purchase poultry: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you buy poultry?" 1/

Poultry suppliers	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Wholesaler-jobber -------------	71	72	76	61
Processor ----------------------	17	25	12	16
Retail store -------------------	11	6	10	19
Country assembler---------------	6	2	7	7
Direct from farmer -------------	1	2	1	--
Not ascertained ----------------	2	--	1	6
Number of plants ------------	333	162	97	74

1/ Percentages add to more than 100 because of multiple answers.

Table 50.--Plants that purchase fish and seafood: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you buy fish and seafood?" 1/

Fish and seafood suppliers	United States total	Employee size group: 1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Secondary wholesaler (dealer away from dock)	79	90	80	66
Retail store	11	4	12	16
Primary wholesaler (boats at dock)	7	7	4	9
Processor	4	5	4	4
Canner	3	1	5	4
Not ascertained	3	--	3	5
Number of plants	360	174	102	84

1/ Percentages add to more than 100 because of multiple answers.

Table 51.--Plants that purchase fresh fruits and vegetables: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you purchase fresh fruits and vegetables?" 1/

Fresh fruit and vegetable suppliers	United States total	Employee size group: 1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Wholesaler	77	94	74	64
Retail store	20	7	25	32
Trucker	4	3	5	1
Shipper	2/*	--	1	--
Grower	1	1	--	5
Not ascertained	1	--	2	3
Number of plants	365	175	104	86

1/ Percentages add to more than 100 because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.

Table 52.--Plants that purchase canned fruits and vegetables: "Here is a list of the usual suppliers of various important kinds of food. From which of these types of suppliers do you buy canned fruits and vegetables?" 1/

Canned fruits and vegetable suppliers	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Wholesaler	93	99	95	81
Canner	8	9	8	3
Retail store	6	1	6	15
Broker	4	4	3	2
Not ascertained	3	--	3	5
Number of plants	356	169	102	85

1/ Percentages add to more than 100 because of multiple answers.

Table 53.--Plants that purchase frozen fruits and vegetables: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you buy frozen fruits and vegetables?" 1/

Frozen fruit and vegetable suppliers	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Wholesale distributor	85	97	90	67
Retail store	7	3	6	15
Broker	3	3	2	2
Not ascertained	7	2	7	16
Number of plants	259	136	71	52

1/ Percentages add to more than 100 because of multiple answers.

Table 54.--Plants that purchase fluid milk and cream: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you buy fluid milk and cream?" 1/

Fluid milk and cream suppliers	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Milk dealer or dairy	96	97	95	99
Sub-contract dealer	3	4	2	--
Retail store	1	--	2	--
Not ascertained	1	--	1	1
Number of plants	374	175	108	91

1/ Percentages may add to more than 100 because of multiple answers.

Table 55.--Plants that purchase fresh eggs: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you buy fresh eggs?" 1/

Fresh eggs supplier	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Wholesaler-jobber	60	75	61	40
Retail store	14	3	17	20
Broker	13	10	9	18
Farmer	9	5	8	12
Cooperative	6	7	4	6
Country assembler	1	3	2/*	1
Not ascertained	1	--	1	3
Number of plants	358	167	103	88

1/ Percentages may add to more than 100 because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.

Table 56.--Plants that purchase flour: "Here is a list of the usual suppliers of various important kinds of foods. From which of these types of suppliers do you buy flour?" 1/

Flour suppliers	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Wholesale jobber	81	91	79	74
Retail store	11	1	11	21
Manufacturer	6	8	6	2
Broker	2/*	1	--	--
Not ascertained	2	--	4	3
Number of plants	327	163	92	72

1/ Percentages may add to more than 100 because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.

Table 57.--Plants that purchase fats and oils (other than butter): "Here is a list of the usual suppliers of various important kinds of foods. From which of those types of suppliers do you buy fats and oils (other than butter)?" 1/

Fats and oils suppliers	United States total	Employee size group		
		1,000 or more	500-999	250-499
	Percent	Percent	Percent	Percent
Wholesaler	71	66	72	72
Manufacturer's branch house	22	30	19	13
Retailer	9	2	10	14
Jobber	2	4	--	--
Packing plant	1	2	1	1
Not ascertained	1	--	2	2
Number of plants	345	163	100	82

1/ Percentages add to more than 100 because of multiple answers.

Table 58.--Plants with food facilities: "On this page are listed various methods used in buying foods. Which of these methods do you use in buying (each food listed)?" (378 plants) 1/

Commodity	Buying method						Do not use product
	U. S. grade	Brand name	Personal in-spection	Written specifi-cations	All other	Not ascer-tained	
	Percent	Percent	Percent	Percent	Percent	Percent	Percent
Fresh meat	82	31	24	7	4	3	1
Canned meat	19	46	8	3	2	15	35
Frozen meat	33	25	7	3	3	14	25
Fresh poultry	43	18	32	7	6	5	14
Canned poultry	1	10	1	1	2	23	63
Frozen poultry	20	16	11	5	3	15	41
Fresh fish and shellfish	13	15	26	7	8	17	25
Canned fish and shellfish	8	53	4	3	2	22	17
Frozen fish and shellfish	13	36	17	7	5	12	22
Fresh fruits and vegetables	22	10	62	8	7	6	4
Canned fruits and vegetables	19	67	7	4	3	13	4
Frozen fruits and vegetables	10	39	9	3	3	14	32
Fluid milk and cream	37	61	10	4	8	3	2/ *
Butter	31	52	7	4	6	7	12
Margarine	12	55	5	3	4	14	19
Other fat (lard and shortening)	13	74	5	4	5	7	5
Flour	9	73	5	4	4	4	11
Bakery products	7	59	26	5	8	7	1
Sugar	11	74	5	4	9	5	1

1/ Percentages add to more than 100 because of multiple answers.
2/ Asterisk indicates less than 0.5 percent.

Table 59.--Plants that purchase specific commodities: "Will you tell me your usual method of payment for each of these foods?

Commodity	Cash or C.O.D.	Open book account						Method not ascertained	Plants
		Total	Net 30 days	Net 7 days	Other net terms	Discount allowed	Terms not ascertained		
	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Percent	Number
Meat ----------------	15	81	29	23	10	5	14	4	361
Poultry -------------	16	80	31	20	10	2	17	4	333
Fresh fish and shellfish ---------	18	74	27	18	11	3	15	8	283
Canned fish and shellfish ---------	11	81	30	16	10	10	15	8	314
Frozen fish and shellfish ---------	16	75	31	13	9	2	20	9	298
Fresh fruits and vegetables --------	23	71	27	17	8	3	16	6	365
Canned fruits and vegetables --------	11	83	29	12	9	17	16	6	356
Frozen fruits and vegetables --------	15	77	30	15	8	5	19	8	259
Fluid milk --------	20	76	32	17	8	3	16	4	374
Flour --------------	15	79	34	9	10	10	16	6	327
Bakery products ----	23	71	29	16	7	4	15	6	365
Butter -------------	17	75	32	16	8	4	15	8	334
Margarine ----------	15	71	27	14	10	4	16	14	304

Table 60.--"In general, are you satisfied with the products or services of your food suppliers, or are you dissatisfied in any way? What specific complaints and dislikes do you have? Have you ever had to change suppliers because you were dissatisfied with their products or services? What were the complaints?"

Responses	Percent
No complaints made about present or former suppliers	42
No complaints about present suppliers, dissatisfied with some former suppliers	23
Dissatisfied with some present (and former) suppliers	35
Source of dissatisfaction with present and/or former suppliers: 1/	
Poor quality	32
Delivery complaints	23
Price	22
Not trustworthy	11
Service generally poor	11
Merchandise not fresh	7
Limited variety	6
Received damaged merchandise	5
Miscellaneous	3
Number of plants	378

1/ Percentages add to more than the 58 percent expressing dissatisfaction because of multiple answers.

Table 61.--"Can you think of any special services *any* of your suppliers provide that you particularly like? What services?"

Responses	Percent
No - No special services particularly liked	23
Yes - Some special services particularly liked	1/ 77
Supplies on short notice, special delivery	31
Generally good services	19
Provides daily delivery	16
Provides good quality foods	13
Provides special packaging, special cuts	9
Helps with menu planning	6
Brings merchandise into plant	5
Good prices	5
Reliable; stand back of their product	5
Provides other special services	4
Furnishes warehousing facilities	2
Stocks excellent variety	2
Miscellaneous	3
Number of plants	378

1/ Percentages add to more than proportion mentioning services particularly liked because of multiple answers.

Table 62.--Suppliers mentioned as providing special services or as sources of dissatisfaction 1/

Responses	Mention of supplier	
	Favorable	Unfavorable
	Percent	Percent
Make no comment or suppliers	23	42
Comment on suppliers	77	58
Type of food supplied:		
Meat	25	35
Fresh produce	7	17
Bakery products	4	12
Milk and dairy products	10	12
Eggs	2	11
Canned goods	3	9
Poultry	3	7
Grocery staples	3	6
Fish and seafood	6	5
Frozen foods	1	3
Ice cream	2	2
Flour	1	2
Coffee	6	2
Fats and oils	1	2
Miscellaneous	2/ *	3
Suppliers in general (no food specified)	39	13
Number of plants	378	378

1/ Percentages add to more than the proportions who comment favorably or unfavorably because of multiple answers.

2/ Asterisk indicates less than 0.5 percent.

Table 63.--"During the past few years, there has become available an increasing number and variety of foods which require less preparation in the institutional kitchen. What advantages are there in using these partially prepared foods in an operation like yours?" 1/

Responses	United States total	Employee size group			Form of operation	
		1,000 or more	500 - 999	250 - 499	Company operated	Contractor operated
	Percent	Percent	Percent	Percent	Percent	Percent
No advantages named	23	14	26	31	25	22
Some advantages	77	86	74	69	75	78
Saves time	44	50	42	38	45	43
Labor saving	43	53	40	34	43	43
Better control--less waste	25	27	25	23	21	27
More uniform	15	19	13	14	17	15
Saves money	12	12	12	11	7	14
Saves storage space	10	12	9	10	12	10
Good for emergencies	7	8	7	6	5	8
Generally convenient	4	4	4	3	5	3
Reduces equipment needs	4	5	2	4	3	4
Permits more varied menus	3	3	4	3	6	2
Reduces cooking failures	3	2	3	4	2	3
Keeps better	2	2	2	2	2	2
Miscellaneous	2	2	2	2	1	2
Number of plants	378	177	110	91	126	252

1/ Percentages add to more than the proportion mentioning advantages because of multiple answers.

Table 64.--"During the past few years there has become available an increasing number and variety of foods which require less preparation in the institutional kitchen. What disadvantages do you see in using them?" 1/

Responses	United States total	Employee size group: 1,000 or more	Employee size group: 500-999	Employee size group: 250-499	Form of operation: Company operated	Form of operation: Contractor operated
	Percent	Percent	Percent	Percent	Percent	Percent
No disadvantages named	42	40	41	47	46	41
Some disadvantages	58	60	59	53	54	59
High price	31	29	30	34	25	34
Low quality	19	20	21	15	20	18
Poor flavor or texture	15	18	12	14	16	14
Requires more storage space	4	4	4	4	2	5
Deteriorate in storage	3	1	4	3	3	2
Can't get menu variety	2	2	3	2	3	2
Inconvenient portion size	2	1	1	3	1	3
Not practical where menu limited	1	1	--	3	--	2
Miscellaneous	2	4	2	1	2	2
Number of plants	378	177	110	91	126	252

1/ Percentages add to more than the proportion mentioning disadvantages because of multiple answers.

Table 65.--Plants with food facilities: Distribution of amounts spent for food used in a four-week period, January-February 1956, compared with distribution of plants in universe to which projections are made

Plant characteristics	Amounts spent for food 1/: Dollars (000's)	Amounts spent for food 1/: Percent	Plants in universe 1/: Number	Plants in universe 1/: Percent
United States total	19,813	100	5,866	100
Employee size group:				
1,000 or more	13,715	69	2,030	34
500 to 999	3,984	20	1,972	34
250 to 499	2,114	11	1,864	32
Region:				
Northeast	5,395	27	1,720	30
North Central	8,615	43	2,349	40
South	4,720	24	1,427	24
West	1,083	6	370	6
Form of operation:				
Company operated	7,937	40	2,122	36
Contractor operated	11,876	60	3,744	64

1/ National estimates derived from sample of plants with 250 or more employees studied in this survey. For details on amounts spent for food, see "Buying Practices and Food Use of Employee Food Services in Manufacturing Plants," Mktg. Res. Rpt. 326, U. S. Dept. Agr.

The questions used in the three major inquiries for this study are reproduced below. These are the telephone screening interviews and the personal interviews with company executives and with facility managers in plants with food services.

Marketing Services Company
Division of Dun & Bradstreet, Inc.
(Survey #55-11-2)

Budget Bureau No. 40-55106
Approval expires 1/31/56

U. S. DEPARTMENT OF AGRICULTURE - SURVEY OF IN-PLANT FEEDING FACILITIES

Form T--To be used for initial telephone interviews with plants of 250+ employees

Interviewer should explain the purpose of this call, using the following suggested introduction:

"I am Mr. _____ of the Marketing Services Company division of Dun & Bradstreet. We have been asked by the U. S. Department of Agriculture to make a nation-wide survey of manufacturers. As part of its marketing research service, the Department of Agriculture would like us to ask you a few questions about the food facilities for employees in your plant. (This shouldn't take more than five minutes of your time.)"

1. Are there any food vending machines in your plant?

2. Are there any milk vending machines in your plant?

3. Are there any other beverage vending machines in your plant?

4. Does your plant have any facilities -- such as employee cafeterias, mobile food carts, or restaurants -- where employees can get regular meals?

(NOTE TO INTERVIEWER: If respondent mentions "snack bar", "sandwich counter", or other miscellaneous types of feeding facilities, ask Question 4a.)

4a. Are any hot foods available in these facilities?

IF "YES" TO Q. 4 OR Q. 4a, ASK QUESTIONS 5 - 7; OTHERWISE ASK QUESTIONS 8 - 9.

5. About how many total employees -- including production, office, and executive -- are there in your plant?

6. Are the feeding facilities used by these employees also used regularly by other plants of your company?
   IF "YES":
   6a. About how many total employees are there in these other plants?

7. Are these feeding facilities operated directly by your own company, or by an outside concessionaire or catering organization, or do you have some other arrangement?
   IF "OUTSIDE ORGANIZATION":
   7a. Name of concessionaire or catering organization

8. As far as you know, has your company ever had regular feeding facilities for employees at this plant?
   IF "YES":
   8a. About how long ago were they discontinued?
   8b. Why were they discontinued? (Probe)

9. Do you plan to establish any feeding facilities for employees at this plant during the next year or two?
   IF "YES":
   9a. What types of facilities do you think will be offered --
   --cafeterias?
   --mobile food carts?
   --restaurants with table service?
   --any other types?

Budget Bureau No. 40-55110
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Form A--To be used with plant management

Plants with feeding facilities

1. In what year did your company begin manufacturing operations at this plant?

2. How many days per week is this plant usually operated?

3. a. How many total employees, including office and executive personnel, will be employed in this plant during January?
   b. Approximately how many men? c. How many women?

4. On the average, does your plant's total payroll remain at about the same level throughout the year, or do you have seasonal peaks where it is substantially (say 20 percent or more) higher or lower than the January total?

5. Of the plant's total employees, including office and executive personnel, about what proportion are primarily engaged in--
   --heavy physical activity?
   --moderate physical activity?
   --light physical activity? (including office or light bench work)

6. How many shifts per day will your plant operate in January?
   IF MORE THAN ONE SHIFT:
   a. About how many employees work at each shift -- including office and executive personnel?
   b. What time does each shift begin and end?

7. How much time is allowed to non-executive employees for their lunch period? (minutes)

8. Are your employees allowed coffee breaks?
   IF "YES":
   a. How many coffee breaks are the majority of employees allowed each day?
   b. How many coffee breaks are allowed to other types of employees each day (specify whether "office", "maintenance" or other type of employee)?
   c. How much time is allowed at each coffee break?

9. Are there any public eating places close enough for your employees to get a meal during their allotted lunch period?
   IF "YES":
   a. Could these public eating places accommodate your plant's peak employee-meal demand during meal periods if you did not provide in-plant feeding facilities?
      IF "NO" TO Q. 9a:
   b. About what proportion of the demand would you estimate could be taken care of by public eating places now available?

10. In approximately what year were regular feeding facilities for employees established in this plant?

11. What were the reasons for setting up these feeding facilities? (What were the principal considerations or conditions responsible for setting up these feeding facilities? Any other reasons?) (Probe)

12. In general, what would you say are the advantages to management of having regular food services for your employees? (Anything else?)

13. What are the drawbacks -- disadvantages to management -- of having these facilities? (Anything else? Any special problems you can think of?)

14. Specifically, would you say these facilities have a good effect, a bad effect, or no effect on--
    a. -- Employee morale?
    b. -- Employee productivity?
    c. -- Employee recruiting?
    d. -- Employee health?
    e. -- Labor-management relations?

Form A - continued-

15. a. Considering your plant's experience with these facilities, if you had the decision to make now, would you set up employee feeding facilities?

IF "NO":
b. Why not? (Probe)

16. a. Is there anything you would do differently now than was done when your facilities were set up?

IF "YES" :
b. What would this be? (Probe)

(BEFORE ASKING QUESTIONS 17 AND 18 BELOW, INTERVIEWER SHOULD REFER TO IDENTIFICATION STUB ON FIRST PAGE. IF FEEDING FACILITIES ARE COMPANY-OPERATED, ASK THESE QUESTIONS USING FORM I; IF FEEDING FACILITIES ARE CONTRACT-OPERATED, USE FORM II.)

Form I	Form II
17. I understand that your plant operates its own employee feeding facilities rather than have them operated by an outside contractor--	17. I understand that your employee feeding facilities are operated by an outside contractor rather than by your own company--

-- What are the good points of the arrangement you use compared with the other arrangement? What do you particularly like about having your food services operated by--

-- your own company? (Probe)	-- an outside contractor? (Probe)
18. What are the disadvantages of operating your own feeding facilities? Is there anything you don't like about it, or prefer about other arrangements? (Probe)	18. What are the disadvantages of having your feeding facilities operated by an outside contractor? Is there anything you don't like about it, or prefer about other arrangements? (Probe)

19. a. Has this plant ever used another arrangement for in-plant feeding operations?

IF "YES" :
b. Why was it changed? (Probe)
c. In what year did you adopt your present arrangement?

20. a. As far as you know now, do you plan to continue having your feeding facilities operated (BY WHATEVER ARRANGEMENT THEY NOW HAVE) or do you plan to change to another type of arrangement?

IF "PLAN CHANGES":
b. What arrangement do you plan to adopt?
c. Why are you considering making this change? (Probe)

21. a. Are all employee cafeterias, restaurants and other feeding facilities serving regular meals under the direction of one person, or are some the responsibility of one person and some of another person?
b. Will you please tell me the name(s) and title(s) of this supervisor (these supervisors)?

22. (ASK ONLY IF FEEDING FACILITIES ARE OPERATED BY THE COMPANY ITSELF)

a. Is it your policy to have your plant's feeding facilities--

--operate on a "break-even" basis?
--return a profit to your plant?
--operate on some form of subsidy?

IF ON A "BREAK-EVEN" OR PROFIT BASIS:
b. Is rent charged to the feeding facilities for the space they occupy?
c. Are utilities charged to the feeding facilities?
d. Are any other expenses specifically charged to the feeding facilities?

IF "YES" TO Q. 22d:
e. Which expenses are they charged with?

Form A - (Q. 22) - continued-

IF FACILITIES OPERATE ON A SUBSIDY:

f. What form or forms does this subsidy take -- is it a direct money contribution from the company, or is it in terms of not figuring expenses for rent, utilities, or what?

Company makes up difference between sales and expense of operation

Rent free

Utilities free

Other expenses absorbed by company (specify)

23. (ASK ONLY IF FEEDING FACILITIES ARE OPERATED BY AN OUTSIDE CONTRACTOR)

a. What arrangements do you have with the individual or firm that operates your feeding facilities--

--Do they work on a cost-plus-fixed-fee basis?
--Do they operate the facilities for a profit like any independent business?
--Does your company guarantee them a minimum profit?
--Do you have some other arrangement? (Describe)

b. Is this contractor charged rent for the space occupied by the feeding facilities?
c. Are they charged for the utilities they use?
d. Are they charged specifically by your company for any other expenses?
IF "YES" TO Q. 23d:
e. Which other expenses are they charged with?
f. Is there any direct subsidy or money contribution from your company to the employee feeding operation?

24. (ASK ALL RESPONDENTS) a. As far as you know now, do you expect that in the next two or three years your plant's feeding capacity will--

--remain at about present levels?
--will be expanded?
--will be reduced?
--will be discontinued?

b. Why do you plan to (expand, reduce, or discontinue) your feeding facilities? (Probe)

25. a. Are any food or beverage vending machines operating in this plant?

IF "YES" ASK QUESTIONS b THROUGH g BELOW: IF "NO" ASK QUESTIONS h THROUGH j.

b. At the present time, what beverages are available in vending machines? (IF "MILK" NOT MENTIONED, ASK SPECIFICALLY WHETHER IT IS AVAILABLE IN VENDING MACHINES.)
c. What foods are available?
d. How many machines do you have for (NAME EACH FOOD AND BEVERAGE LISTED)?
e. Are you planning to add or decrease in number or capacity any of the kinds of vending machines you now have? If so, which ones?
f. Are you planning to add any new kinds of food and/or beverage vending machines?

IF "YES":
g. What kinds?

IF "NO VENDING MACHINES IN PLANT":
h. have you ever had vending machines in this plant?
IF "YES":
i. What foods and/or beverages were sold through vending machines?

j. Why were they discontinued?

26. a. In general, what would you say are the good points of having vending machines in a plant? What advantages do you see in having them? (Probe)
b. What would you say are the drawbacks or disadvantages of having vending machines?

BUDGET BUREAU NO. 40-55109
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Form B--To be used with food service managers

Plants with Feeding Facilities

1. a. What types of feeding facilities are operated for employees of this plant -- do you have cafeterias, mobile food carts serving hot meals, restaurants with table service, any other facilities serving hot foods?

   b. How many ____ (ASK FOR EACH TYPE OF FACILITY OPERATED) are operated regularly in this plant?
   c. In which kind of facility do you feed the largest number of employees?
   d. Which facilities are open for coffee breaks, and how many (OF EACH)?

   IF NONE OF THESE SERVICES ARE OPEN FOR COFFEE BREAKS:

   e. Where do employees go for snacks during coffee breaks?

2. a. Which types of meals do you serve regularly each day?
   b. What are the serving hours?
   c. Is milk available to employees at all these times?

   IF "NO":
   d. When is milk not available?
   e. Is milk available to employees during coffee breaks?

3. About what percentage of your plant's employees would you estimate eat meals in your food services on an average day?

4. What types of menus do you usually offer in your ____ (MENTION MOST IMPORTANT FOOD FACILITY AS INDICATED IN Q. 1.c)--

   -- only budget meals or special combination plate?
   -- only a la carte foods?
   -- both budget meals and plates and a la carte foods?

5. Are any foods provided to employees without charge regardless of whether other foods are bought?

   IF "YES":
   a. Which foods?

6. Do you operate your own butcher shop on the premises?

7. What kinds of baked goods do you produce regularly in your own facilities on the premises? (NAME EACH FOOD SHOWN BELOW)

   Yeast breads?
   Yeast rolls?
   Quick breads?
   Pies?
   Cakes?
   Cookies?

   Any other baked goods? (specify)
   None - Have no bakery facilities on premises

8. Do you have your own ice cream making facilities on the premises?

9. Do you have any zero freezer space on the premises?

   IF "YES":
   a. What is your approximate total cubic footage (or dimensions) of usable zero freezer space?
   b. About what share of this space is used for foods other than ice cream?
   c. Is this zero freezer space adequate for your needs, or would you like to use more frozen foods than you have room for now?

10. a. During the next year or two, are you planning to increase your zero freezer space, decrease it, or keep it at current levels?

    IF CHANGE IS INDICATED:

    b. Why are you planning to make this change?

Form B - continued-

11. Here is a list of the usual suppliers of various important kinds of foods (SHOW RESPONDENT THIS PAGE). From which of these types of suppliers do you buy (meat)?

Approximately what proportion of your (meat) do you buy from (EACH TYPE OF SUPPLIER)?

(REPEAT THESE QUESTIONS FOR EACH COMMODITY LISTED)

a. Meat
  - Hotel and restaurant supply house
  - Packer-owned branch house
  - Packing plant
  - Retailers
  - Other (specify)

b. Fish and Seafood
  - Primary wholesaler (boats at docks)
  - Secondary wholesaler (dealer away from docks)
  - Processor
  - Canner
  - Other (specify)

c. Poultry
  - Wholesaler-jobber
  - Cooperative
  - Processor
  - Country assembler
  - Broker
  - Other (specify)

d. Eggs, Fresh
  - Wholesaler
  - Jobber
  - Broker
  - Cooperative
  - Country assembler
  - Other (specify)

e. Fresh Vegetables and Fruit
  - Wholesaler
  - Shipper
  - Trucker
  - Other (specify)

f. Canned Vegetables and Fruits
  - Wholesaler
  - Broker
  - Canner
  - Other (specify)

g. Frozen Vegetables and Fruits
  - Wholesaler distributor
  - Broker
  - Other (specify)

h. Fluid Milk and Cream
  - Milk dealer
  - Sub-contract dealer
  - Other (specify)

i. Flour
  - Wholesaler-jobber
  - Broker
  - Manufacturer
  - Retailer
  - Other (specify)

j. Fats and Oils (other than butter)
  - Manufacturers' branch house
  - Wholesaler
  - Jobber
  - Other (specify)

12. In general, are you satisfied with the products or services of your food suppliers, or are you dissatisfied in any way? Please consider specifically your suppliers of meat, fish and seafood, poultry, shell eggs, fruits and vegetables, dairy products, etc.

What specific complaints and dislikes do you have? (Probe)

What changes and improvements would you like to see made in any of these suppliers' products or services? (Probe)

13. Can you think of any special services any of your suppliers provide that you particularly like? (What services? Which kind(s) of suppliers?)

14. Have you ever had to change suppliers because you were dissatisfied with their products or services? a. Which products, and what were the complaints?

15. On this page (SHOW PAGE TO RESPONDENT) are listed various methods used in buying foods. Which of these methods do you use in buying your (fresh meat)? Of course, the methods shown on the page may be "overlapping"; if so, please mention all the methods which apply to your (fresh meat) purchasing. (REPEAT QUESTION FOR EACH FOOD LISTED.)

Grid headings were: U. S. Grade; Brand Name; Personal inspection; Written specifications; On extended contract (future delivery); Other methods

16. Using this page(SHOW TO RESPONDENT), will you tell me your usual method of payment for each of the following foods? Grid headings were: Open book account; Time; Discount Terms-Percent/Days

17. During the past few years, there has become available an increasing number and variety of foods which require less preparation in the institutional kitchen--for example, cake and roll mixes; instant desserts and instant beverages; instant nonfat solids (dry milk); prepeeled potatoes; portion-size meats; and ready-to-heat-and-eat frozen foods. a. What advantages are there in using these partially-prepared foods in an operation like yours?(Are there any other things you like about using them?) (Probe) b. What disadvantages do you see in using them? (What don't you like about using them?) (Probe)

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